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ABSTRACT

This book is designed as a resource for educators who teach business content in a variety of instructional settings. It contains case studies representing all functional areas of business, including corporate training, for grades 7 through graduate education. Chapter 1 provides an overview of the case study method. The history of the case method, its theoretical grounding, definition, characteristics, types, and teaching and learning approaches are discussed. To help readers determine whether the case study method is an appropriate choice for their learning environment, the method's advantages, disadvantages, and appropriate usage are addressed in the critical analysis. Chapter 2 presents strategies to assist teachers and learners in successfully using the case method in diverse settings. Chapter 3 contains 74 case studies representing 12 subject areas of business and 14 learning competencies. At the beginning of the chapter, a detailed index assists readers in finding the best case studies for their needs. The detailed index classifies each case by subject area, learning competency, industry type, and grade level. The page number of the corresponding discussion idea for each case is also provided on the index page. Chapter 4 provides discussion ideas for each case study. Chapter 5 presents a comprehensive reference list of 80 sources. (YLB)

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CASE STUDIES FOR EFFECTIVE BUSINESS INSTRUCTION

Donna McAlister-Kizzier

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Case Studies for Effective Business Instruction

by

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The author welcomes hearing from educators regarding the usefulness of this publication in your classrooms. Comments can be directed to the DPE National Office or to the casebook author.

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Preface

This book of Case Studies for Effective Business Instruction is designed to serve as a resource for educators who teach business content in a variety of instructional settings. Within this publication are case studies representing all functional areas of business including corporate training, for grades seven through graduate education.

Chapter 1 provides an overview of the case study method. The history of the case method, its theoretical grounding, definition, characteristics, types, and teaching and learning approaches are discussed. To help readers determine whether the case method is an appropriate choice for their learning environment, advantages, disadvantages and appropriate useage are addressed in the critical analysis.

Chapter 2 presents strategies to assist teachers and learners in successfully employing the case method in diverse settings. Chapter 2 is a companion to Chapter 4, where readers will find discussion ideas for each case study found in Chapter 3.

The heart of this publication is located in Chapters 3 and 4. In Chapter 3, readers will find 74 case studies representing 12 subject areas of business and 14 learning competencies. At the beginning of Chapter 3, a detailed index assists readers in finding the best case studies for their needs. The detailed index classifies each case by subject area, learning competency, industry type, and grade level. The page number of the corresponding discussion idea for each case study is also provided on the index page. Chapter 4 provides discussion ideas for each of the 74 case studies.

The cases and solution ideas found in Chapters 3 and 4 were selected using a nationally refereed, blind review process. Case authors are experienced and respected educators and practitioners representing content expertise in the various business functional areas represented. During the solicitation process, the casebook editor provided explicit format and style guidance to case authors, based on recent research in the effective use of case methodology in business learning environments. Reviewers, experienced business educators and practitioners from all functional areas and grade levels in business, provided critical editorial feedback and valuable guidance regarding the appropriate educational level and functional area of the case studies.

Chapter 5 provides a comprehensive reference list of sources cited in the research used to conceptualize, edit and write this book.

Permission is granted for teachers to photocopy any of the cases to use for their classroom activities.

Chapter 1

The Case Study Method

During the 1980s, several national reports challenged secondary, postsecondary and collegiate educators to transform the educational experience into one that actively engaged learners. In 1993, Eison and Bonwell called the incorporation of active learning techniques into the classroom "a national priority in education" (p. 3). Related to this movement and occurring concurrently was an emerging emphasis to stimulate critical thinking skills in students. Business educators, pioneers in the use of learning approaches that stimulate critical (or higher-order) thinking, were often at the forefront of such discussions. One such approach, pioneered within the fields of law and business and still widely embraced within those fields, is the case study methodology.

History of the Case Method

Christopher Columbus Langdell, former dean of the Harvard Law School, introduced the case method in 1878, replacing the more passive learner methods of treatises, commentaries and lectures. As early as 1908, the case method migrated to the Harvard Business School. Since that time, a number of schools and disciplines have emulated and adapted Harvard's successful case teaching model.

Case scholars (Catron, 1984; Merseth, 1991) report the wide and effective use of the case approach in a diverse array of disciplines, including, among others, clinical psychology, law, engineering, medicine, public policy, and business. However, among these professions, the purpose, content, and method of case-based instruction vary. The contrast between the purpose, content and method in the fields of legal and business education is especially pertinent to those in business education who seek to effectively implement the case approach as an instructional strategy.

In legal education, the purpose of case-based instruction is to teach legal principles and conventions of reasoning and logic. The law instructor uses a form of Socratic dialogue to illuminate precedents as related to a predetermined, more general proposition. Using appellate court decisions as case material to represent exemplars of judicial reasoning, aspiring lawyers are trained to examine and analyze threads of legal precedent, using deductive logic that minimizes personal and subjective factors (Kleinfeld, 1988).

In contrast to legal educators, business educators use the case method to stimulate discussion and analyses and to determine alternative actions (Merseth, 1991). Stimulation of problem solving, an element of critical thinking, is inherent in the business case approach. When used successfully, the case method enables learners to apply theory and abstract knowledge to address situation-specific dilemmas (Christensen, 1987). Whereas legal cases are based on actual court decisions, business cases are based on fieldwork; therefore, in contrast to legal cases, business cases are often ambiguous and complex.

The discussion method used with business cases is also distinctive; rather than using Socratic dialogue, business case instructors ask questions to guide the discussion and to engage students as vicarious participants and analysts. Kenneth Andrews (1954, p. 98) describes the tricky role of the business case instructor, who "exercises control over an essentially 'undirected' activity, but at the same time . . . keeps out of the way, lest he prevent the class from making discoveries new also to him . . ." Merseth (1991) remarks that business case instructors must manage not only the content of discussion, but must also be acutely aware of the process of interaction.

In summary, in legal education, a well-defined knowledge base with discernable threads of precedent and deductive logic exists; in contrast, in business education, a portion of the knowledge base is always in flux, responding to a constantly shifting business environment. Inherently, business education stresses inter-relationships among humans and the complex connectedness of all organizational components, functions, and processes (Merseth, 1991). Therefore, in business, context is a fundamental element. For example, as Christensen (1987, p. 33) notes, a specific issue "will always influence and be influenced by the general situation . . . must consider not only the present circumstance of any issue but also its historical legacy and future perspective . . . must accept that any problem may well be understood differently by individuals and groups, and that perceptions change."

Theoretical Grounding

Case studies are based on objective, realistic descriptions of human life; therefore, the case approach simulates experiential learning, or "learning by doing." Cases are unstructured, approximating the uncertainty, confusing, conflicting and incomplete information afforded in real-life business decision making. Kingsley (1981) observes the case method "appropriates from late nineteenth-century naturalism" and "subscribes to the formalist doctrine that the case is a self-contained entity which can be interpreted without recourse to the author, environment, or reader" (p. 42). The case method allows students to vicariously participate in realistic situations within their fields, gaining experience in analysis and decision making.

Conceptually, the case method has roots in the work of cognitive psychologists and curriculum theorists (Merseth, 1991). The case-based pedagogy involves what Jerome Bruner calls narrative rather than paradigmatic knowing; knowledge is incorporated in the situation being studied and the experience the discussants bring to it as opposed to knowledge being abstract and scientific (Shulman, 1986; Merseth, 1991). Merseth (1991) links cases to the knowledge base that underpins Joseph Schwab's (1969) curriculum work, i.e., "a curriculum which, through and through, requires the competencies of looking, listening, and reading with respect to form and structure, coherence, and cogency . . . a shift from the merely lectorial to the discussional, a shift from merely knowing what is said to knowing how it came to be said" (p. 48-49).

Definition

According to Merseth (1991), when educators speak of the case method, "widely divergent views" (p. 4) emerge regarding definition, purpose and use of the term. Ellington (1983) defines a case study as an in-depth examination of a real-life or simulated situation carried out in order to illustrate special and/or general characteristics. Paget (1988) defines the case method by examining both what it refers to and what its use is intended to achieve, i.e., although the case can be used simply to illustrate a concept, typically, the case is developed through analysis and discussion to investigate possible causes or consequences in circumstances or behavior.

Paget (1988) describes the three major areas of the case method and provides insight into how each area can be incorporated into the learning environment based on objectives, organizational structure and communication medium employed. The three major areas of the case method are the **case report**, **case analysis** and **case discussion**.

The **case report** can be presented in a variety of forms. For example, it can be presented live by the key player(s) in the case, orally by student or by instructor lecture, in printed form or written by students, by students role playing, by using audiovisual and/or electronic means, and/or via student interaction with computer systems. The **case analysis** typically involves analysis of case material based on content, process, skills and alternative strategies. Finally, the **case discussion** can take several forms; for example, individually with a lecturer, in groups formed formally or informally with the total class, with various degrees of structure, and with the computer (interactive or remedial).

Many terms are used synonymously with the case method. Paget (1988) identifies the terms critical incidents, digests, and condensed cases without full supporting documentation. According to Paget (1988), other researchers use such terms as vignettes, incidents, anecdotes (Wagner and Sayles, 1972), incident processes (Pigors and Pigors, 1961), text-problems (Davis, 1960); and living cases (Towle and Dauten, 1957).

Characteristics of Cases

Pigors and Pigors (1961) describe five characteristics common to all case reports. Case reports describe an event or set of circumstances with reference to a specific time scale. Cases illustrate the circumstances in some depth, providing a rich source of material from which learners could derive insight. Cases manifest formal and informal interaction in relationships among people. Cases depict dynamic events in various stages of work-oriented and interpersonal processes. They incorporate integrity, reporting facts honestly, thereby freeing learners to make interpretations and to draw inferences. Case scholars agree that an essential characteristic of the case report is realism.

Types of Cases

According to Paget (1988), the case can take many forms. For example, the case can incorporate factual situations that are realistic, practical and relevant; it can be investigated as an object to be observed, described, analyzed, diagnosed, solved or reported upon; or, the case can be a naturalistic object of inquiry. Paget (1988) identifies four clearly identifiable types of cases. First is the **pure case study;** the pure case study, often used in legal or business education, is a conventional report that

illustrates specific characteristics. A second type of case study is the **game used as a case study**, an exercise that contains characteristics of both games and case studies, but not characteristics of a simulation. An example of this type of case study is the type of game designed for use in learning symbolic logic and mathematics. Yet another type of case study is the **simulated case study**, commonly used in medical training which incorporates simulated patient scenarios. The fourth type of case described by Paget is the **simulated games used as case studies**, typically used in management instruction. The case studies contained within this publication most closely resemble Paget's pure case studies.

Clearly, in his typing of case studies, Paget recognizes the similarity between the case method and games or simulations. Schoen and Sprague (1954) outlined characteristics that differentiate the case method from other learning techniques. For example, Schoen and Sprague (1954) note that, unlike more traditional lecture or discussion approaches, the case method allows the student to participate in the experience both emotionally and intellectually, taking an active role in analyzing and discussing the case. In addition, the case method originates in a detailed discussion of a specific case, accenting the particular rather than the general.

Teaching/Learning Approaches

Not only do definitions and types of case methodology vary dramatically, but also teaching and learning approaches used with the case approach vary considerably. For example, a case can be used as an illustration or analogy of specific content or theories. It can be integrated short or long-term. The instructional focus could be the study, reporting, analysis and/or the discussion of the case. The case study itself can be presented to students or produced by students, and the case can be either the basis of general student discussion or the grounds for specific questions directed to the students.

The instructional dynamic that exists between case substance and instructional process is worthy of special emphasis by several scholars. Lee Shulman (1996), professor of education at Stanford, argues that it is within the substance of the case (not whether it is lectured about or discussed) that its "instructive power lies." Bill Welty, professor of management at Pace University, advises that cases cannot and should not be divorced from instruction; process is as important as content (Merseth, 1992). Welty and others, such as C. Roland Christensen, of Harvard Business School, stress that the key to success of the case method is the discussion (Welty, 1989). Through discussion, students "learn to identify actual problems, to recognize the key players and their agenda, and to become aware of those aspects of the situation that contribute to the problem." Merseth (1992) notes that the substance of the case and process of discussion "are complementary and . . . both are important" (p. 5).

Specific examples of teaching and learning strategies used effectively in the case approach are provided in the next chapter. In order to provide the reader with a deeper understanding of the appropriate use of cases, a critical analysis of the case method is discussed next.

Critical Analysis of the Case Method

How does the instructor determine when the case approach is most appropriately used? What are the advantages and disadvantages of using cases? Answering these two questions is the purpose of this critical analysis of the case method.

Appropriate Use. Little doubt exists that case studies are widely accepted in business learning environments. For example, Rath (1981) remarks that two major comprehensive studies of academic management education urged the use of case methods for some significant part of the education. Also attesting to the adoption of the case method in business education, Douglas (1990) reported, "Since its inception at Harvard Business School in the 1920s, the case method has become a primary tool for management education" (p. 251). Specifically, in undergraduate education, business schools have used the case approach as the primary teaching method for strategic management or policy courses; the case method is also prevalent in small business management, bank management, organizational behavior and economics courses.

Although acceptance of the case method in business education is prevalent, responsible use of any teaching/learning method requires a critical analysis of appropriate use. Paget (1988) succinctly summarized the current perspective on appropriate case use as "one of the most wide-ranging and powerful tools, but not one which is unconditionally best for all purposes, for all students, and for all courses."

To help educators determine under what conditions case studies are the most appropriate choice, McLennan (1974) and Schoen and Sprague (1954) suggested educators consider institutional and programmatic context, personalities and abilities of faculty and students, and course objectives. According to Rath (1981), case studies are especially appropriate when students need to learn about "common and recurring problems in a field and to develop their expertise in analyzing given situations in

a search for these problems and to propose appropriate solutions . . ." (p. 107). Douglas (1990) provides direction to help instructors decide about appropriate use of the case method within an instructional unit or course: "the case study is used as a source of learning reinforcement and is a component of a total experiential process that begins with a traditional lecture/ discussion." Further, Sykes (1996) observes that instructors can set cases in a wide range of instructional contexts, for example, they can be employed as launching pads, as terrain for repeated visits, as practice sites, as culminating activities, or as evaluation devices, among others.

When the instructor desires to foster the development of analytical skills that sustain critical thinking, including decision-making, in a variety of contexts, the case method is an appropriate choice. In the case approach to learning, nothing is straightforward; rather, the learning is a struggle as students learn how to evaluate raw, often incomplete data, separate important from unimportant facts, assign priorities, and assemble disparate facts into a coherent argument. In addition, when the instructor desires to involve learners in a situation that calls for analysis and action rather than having them talk about someone else's theory, case studies are appropriate. Good case studies in business stop where the need for action begins, enabling students to take positions under conditions of uncertainty.

Sykes (1996) provides additional insight into the appropriate use of cases in instructional contexts. Sykes (1996, p. xi) says that "Some case users conceive professional knowledge **in the case**; others conceive the requisite knowledge as brought to bear **on the case** from other sources (e.g., 'theory')." The approach taken is the choice of the instructional designer. Sykes also observes that some instructors carefully fabricate cases before instruction, then anchor discussion in those fabricated particulars; while others encourage students to create and share their own cases, shifting case work from reader response to student production.

After considering the learning context, the instructor determines if and how the case method can be best employed. Advantages and disadvantages of the case method, discussed next, are important factors to consider when making this instructional decision.

Advantages of the Case Method. A review of literature elicited many advantages related to using the case approach in educational settings. The general theme extracted is that, used skillfully, the case approach has the potential to elevate the learning experience to a higher level. Although not a comprehensive list, evidence exists that the case method can, when used appropriately: (1) enhance learning realism and relevance; (2) promote the creation of a community of learners; (3) develop critical analysis, decision making, problem solving, and strategic thinking; (4) enable students to apply knowledge acquired in life experiences or through research activities; (5) involve students in their own learning, encouraging self-reflection; (6) enhance interpersonal, analytical and communication skills; (7) heighten flexibility, tolerance and creativity; (8) enhance content integration; (9) encourage development of student initiative; and (10) stimulate maturity and intellectual growth. Each of these advantages is discussed next.

Researchers have noted that, by bringing "chunks of reality" (Lawrence, 1960) into the classroom, cases can help bridge the gap between abstraction and application, thereby **enhancing learning realism and relevance**. Cases can heighten student interest through the discussion of relevant, realistic and complex situations based in a social context (Greenwood, 1993; Kreps & Ledersman, 1985; Paget, 1988). Students are reported to remember the learning related to such scenarios longer and to react more strongly than with traditional instructional strategies. Additionally, realism can be enhanced when some aspects of simulation or gaming are introduced into the case approach (Ellington, 1983). Although realistic, cases allow students to practice relevant skills in a safe environment, reducing such barriers as cost, time, anxiety or ethical concerns (Solem, 1960).

With individuals taking responsibility for their own learning and also contributing significantly to the learning of others, the case method stresses dependence on shared problem solving, **promoting the creation of a community of learners**. Ideas are generated for discussion, with students learning from the information contributed by other members of the class. In addition, because the case approach often involves small group discussion, more balanced student involvement is achieved; reticent students feel less threatened participating in small groups. A side benefit of more balanced student involvement is students develop the skill required to use other learners as resources.

One of the most widely cited advantages to the use of case studies is the **development of critical analysis, decision making, problem solving and strategic thinking ability** in students (Christensen, 1987; Kowalski, Weaver, & Henson, 1990; McNair, 1954; Pearson, 1951; Towl, 1969; Lachs, 1984). In 1951, Pearson observed the case method provided "the power to analyze and to master a tangled circumstance by selecting important factors; the ability to utilize ideas, to test them against facts, and to throw them into fresh combinations . . . for solution of the problem; the ability to recognize the need for new factual material or the need to apply technical skills; the ability to use the latter experiences as a test of validity of the ideas already obtained" (p. 178).

Using the case approach, **students learn how to use and apply knowledge acquired in life experiences or through research activities performed in relation to the case**. Students gain practice in decision making in a relatively non-threatening environment, thereby developing self-confidence in their ability to make decisions. Cases encourage students to think analytically and objectively, using a systematic mental approach to consider the numerous variables and untangle a complex array of facts and inferences. Students learn how to segregate information into useful and manageable portions, expressing both objectivity and subjectivity in various degrees. And, students develop skill in projecting outcomes; they learn how to deal with anticipated consequences, forcing students to generate strategic plans, predict consequences and implications, and recommend alternative plans.

In addition to the advantages previously discussed, the case method **involves students in their own learning and encourages self-reflection**. In the case approach, students must become active learners who bring their previous knowledge, experience, personal feelings, dispositions and values to the learning process. The case approach can help novices explore and reformulate their own notions about their chosen career (Feiman-Nemser & Buchmann, 1985). The case process is not designed to bring closure to topics discussed, rather, it is an active learning pedagogy that provides unique and meaningful experiences for students to question, to reconcile controversial evidence, to internalize and generalize knowledge into principles to guide their own behavior (House, 1975). Cases enable learners to be responsible for their own learning. This individually empowering dynamic encourages long-term self reflective behaviors; as noted by Silverman and Welty (1993) the case process invokes intellectual disquiet in learners, provoking them to apply the case method heuristic to their own problems.

Further, scholars report the case method can **enhance interpersonal, analytical and communication skills**. Because the case method achieves objectives through students working in teams with other learners, the method can enhance interpersonal skills among learners (Cochran & Gibson, 1984). Kolb (1981) calls case methods "experiential forms of learning" which require active experimentation and participation with others. The group itself may become the focus of student activity, encouraging development of interpersonal skills, tolerance, and leadership responsibilities. Pigors and Pigors (1961) maintain that, although case methods require the same technical skills as more traditional individually based methods, case discussion reaps superior benefits for learners. Glover, Hower and Tiagiuri (1973) provide insight into benefits related to interpersonal, analytical and communication skill: "classroom discussions of cases . . . force one to face one's own limited subjectivity, improve one's understanding and capacity to react sensibly and usefully to evolving situations, and to help one grow in the courage and will to decide, act, and help mold situations." A side benefit of the case method is that it fosters open communication among students and between students and the teacher (Schoen and Sprague, 1954).

Scholars of communications have identified a number of ways case studies can enhance communications skills. For example, reading the case can expand vocabularies, understanding case details can improve reading comprehension, and reporting to others formally or informally can enhance speaking ability. Additionally, generating reports related to the case can enhance writing ability and the case study process can require that students analyze, interpret and assess information in order to communicate case action clearly and logically.

Several scholars observe the case method can **heighten flexibility, tolerance and creativity of learners**. Davis (1960) comments that because the case method builds upon both theory and personal experience, it requires learners to share differing view points. Paget (1988) adds that both tolerance and creativity are required as students learn that there is no one best solution to problems. Argyris (1964, 1973) and Argyris and Schon (1976) observe that by their very nature case methods are oriented toward cooperative action and the synthesis of individual knowledge. Through this cooperative action, Burgoyne and Stuart (1976), Harvey (1979) and Paget (1988) observe learners can become more sensitive and amenable to change.

Furthermore, the case method can **enhance integration of course content**. In management education, Jones (1983) reported the case method has the potential to cross traditional content boundaries, broadening the perspective of the learning beyond what one subject specialist might teach. Jones encouraged a team teaching approach to encourage synthesis and integration of business content.

Another advantage often connected to the case method is that it can **enable students to develop initiative**. In some situations, students must work under tremendous time pressures and coordinate with other students. Some cases may involve external research, tapping initiative.

Finally, the case method can **stimulate maturity and intellectual growth**. Hunt, Popp and Entrekin (1977) describe the broadening of students' frame of reference in the case process. Students gradually master highly complex problems, using a rational problem solving approach. This process requires a high degree of mental activity, heightening students' awareness of their own limitations and abilities. The case process can also develop an orientation toward action.

Disadvantages of the Case Method. Although advantages to the case method are captivating, the approach has its limitations. Such disadvantages as **writer bias; limited instructor skill; limited or abbreviated availability of case material; ineffective for some content; heightened anxiety, confusion or helplessness; requires aggressive competitive discussion; potential gender bias**, and **inefficiency** are noted in the literature. A discussion of these limitations follows.

Desbert and Fisher (1996) note that written **cases may be biased** based on the case writer's language and decisions about which elements to include and which to omit. To alleviate this limitation, Desbert and Fisher (1996) suggest integrating video technology to lessen the influence of the "writer's eye" bias; video technology allows students to visually view a case and extract relevant information (p.40-55).

In addition to potential writer bias, **instructor skill can be a limiting factor** in the success of the case method. Merseth (1991) writes that "effective case-method instruction requires extensive, specialized skill on the part of faculty who use the pedagogy" (p. 20). Christensen and Zalenik (1954) report that "dealing with concrete situations is a far more complex and demanding task than working with any set of generalizations or theories" (p. 215). Merseth (1991) observes that case-based instruction demands that instructors not only be thoroughly familiar with the subject, but that they also understand the characteristics of their learners and the dynamics of group interaction. Therefore, to effectively use case teaching, teachers must develop a highly refined sense of integration of content and process.

Another limitation of the case method is the **limited or abbreviated availability of case material.** Paget (1988) noted the limited amount of case material available for teaching. Pigors (1967) criticized "fabricated and abbreviated" cases. Glover, Hower, and Tagiuri (1973) countered the fabrication criticism by admitting that no case report can represent reality fully; rather it can be beneficial to have to cope with problems of incomplete information. Since real life never contains all the facts, Glover, Hower, and Taguiri (1973) note that case methods can increase students' ability and confidence to do one's best with the available data.

Although case methods can be modified to meet a range of educational objectives, they are **not effective for all content**. For example, cases are not normally effective for development of specialized technical expertise (Gordon & Howell, 1959).

Some also report the case method can **heighten feelings of anxiety, confusion or helplessness**. Because of the unpredictable direction of class discussion inherent in the case approach (with no firm rules or "textbook" solutions), some students and teachers can be uncomfortable with the method (Dunn, 1954; Gragg, 1954). This anxiety is especially true for students who expect teachers to think for them and to supply clear answers and for teachers who enjoy strict control and highly structured lesson plans (Grosse, 1988). However, learning to manage the risk factor and anxiety can become a growth experience especially beneficial for aspiring leaders (McNair, 1954; Dunn, 1954).

The case method **requires aggressive competitive discussion.** This factor is perceived as both an advantage and a limitation. Students must be prepared in advance for open debate and immediate criticism and must be able to defend their views without hesitation against the counterattacks of other group members (Ronstadt, 1980; McNair, 1954; Gragg, 1954). Dunn (1954) remarked that in case discussion, the student must be a risk taker and should possess a "tough yet flexible mind."

Because of the competitive, risk-taking dynamic required for some types of case learning, a few case scholars note **potential gender bias**. Riley (1989) remarks that gender bias is "fundamental to the process as it has evolved," and it "appears to have been shaped by the values of its formative male environment." Riley (1989) refers specifically to the discussion aspect of case studies, noting that "successful participation in case discussion appears to require aggressive competitive discussion that is contrary to the learned behavior of women." Henning and Jardim (1977) and Miller (1976) describe women's reluctance to take risk and to engage in open competition, particularly with men, because they have been conditioned to prevent men from feeling uncomfortable. Gilligan (1982) reports that while men gravitate toward and are motivated by competition, women avoid competition and prefer connection.

Based on a review of research, Riley (1989) summarized gender bias concerns related to the competitive demands of case studies as follows: (a) the essence of the case method is aggressive, competitive group discussion; (b) men dominate mixed discussion groups in general, and women have difficulty being heard in these groups; (c) classroom experience favors men over women and gives men a more supportive atmosphere and more opportunity to express their views; (d) women tend to avoid risk, open competition and conflict with males, and forceful presentation of contrary views. Thus, Riley hypothesizes that the case method has an inherent gender bias that disfavors women when used in a mixed group, noting that "the very characteristics extolled as virtues of the method are those most inimical to participation by women."

McHenry (1986) supported Riley's hypothesis in a description of a "mature and capable" woman's experience with the Harvard Business School case method. After experiencing anxiety and inability to speak in class, the woman described the case method as "management by fear." A number of studies in education indicate that men dominate and significantly influence mixed gender discussion (Riley, 1989; Bradford, Sargent, & Sprague, 1975; Krupnick, 1985; Aries, 1974; Zimmerman & West, 1975; DiBernardis, Ramge, & Levitt, 1984; Lockheed & Hall, 1976; Sadker & Sadker, 1986; Parlee, 1979). Also problematic in any learning environment, elementary through college level, is evidence indicating instructors are more attentive and responsive to males (Croll, 1985; Sadker & Sadker, 1986; Bradford, Sargent, & Sprague, 1975; Wartik, 1986).

Because the case method requires time to executive effectively, some early case scholars criticized its **inefficiency** in the use of instructional time (Gordon and Howell, 1959; Niland, 1954).

In summarizing this critical discussion of the case method, this author agrees with Paget (1988) who writes that no teaching method is foolproof. The successful use of any teaching-learning strategy requires a "thorough understanding of all that is involved and the flexibility to be able to adapt methods to fit the circumstances" (Paget, 1988, p. 179). Although concerns regarding competence of students or faculty to successfully employ case methods successfully is realistic, as Paget (1988) remarks, such concerns do not "constitute a valid argument against the use of case methods in general" (p. 179).

Chapter 2

Instructional Strategies for Teaching Case Studies

As Chapter 1 discussed, effectively incorporating case studies into the learning environment can be rewarding as well as challenging for teachers and students. This chapter summarizes successful instructional strategies collected from the literature. First, instructional strategies reported to be effective in managing or facilitating the case method are shared. Secondly, strategies the instructor can use to enable learners to maximize the effectiveness of case analysis and discussion are presented.

Management/Facilitation Strategies

The only limit to how case studies are used in the classroom is the instructor's creativity and imagination! Sykes (1996) advises, "Educators interested in case use might simply consult their imaginations for ideas, and this seems a promising starting point under present circumstances. But the experience of others with cases can serve to fortify the imagination . . . " (p. xii). To help inspire the reader's imagination in designing case lessons, this section of the chapter shares the selected experience of others. Specifically, this section discusses **instructor role, learner empowerment, content knowledge, pre-discussion procedures, instructor preparation strategies, room arrangement, group facilitation and questioning skills, and assessment strategies.**

Instructor Role

John Kotter (1979) colorfully describes the multiple roles the instructor may play during a case discussion; such roles include facilitator, demonstrator, coach, quarterback, producer, referee, dance master, choreographer, prosecutor, evangelist, judge, conductor, soothsayer, lion tamer, district attorney, senior airline captain, Will Rogers, and Aesop. Most case scholars describe the case instructor's role as lying somewhere along a continuum with facilitator at one anchor and demonstrator at the other anchor of the continuum.

Several case scholars comment on the complex dynamics of navigating the multiple roles of a case facilitator. Lachs (1984) and Merseth (1991) write that the instructor develops a sense of the integration of content and process, at times remaining passive while student discussion flows and at other times actively guiding class discussion. Welty (1989) notes that through active listening, skillful questioning and appropriate silences, the instructor exerts a strong influence on the learning process. Merseth (1991) remarks, "Expert case teachers are leaders at the same time that they are participants in a complex learning process" (p. 21). Joseph Schwab (1969) suggests that the instructor must be alertly and sensitively mindful of what each student is saying and doing, not only in the moment, but in the whole course of the discussion.

Learner Empowerment

A fundamental characteristic of case instructional methodology is students assume responsibility for their own learning, playing a central role, accepting and maintaining ownership of each phase of the method. Students identify problems, discuss the case situation and its implications, propose and defend alternative solutions, react to classmates' criticisms and suggestions and ultimately choose an appropriate course of action. Throughout this process, the students assume responsibility for their own learning.

The instructor's role in this process is to acquaint students with a new form of learning, a form that shifts the ultimate authority from instructor to student. Barnett and Ramirez (1996) describe the journey of learner empowerment from teacher and learner perspectives:

> . . . through time and discourse, and some guidance . . . [learners] will negotiate meanings that will help them build conceptual understandings. Equally important is having a sense of what and how learners are thinking, and being able to elicit that in a safe environment, one in which they are allowed to work things through at their own pace, and make changes in their thinking in their own time. In order to do this, a teacher must have a certain comfort level in his or her own conceptual understanding of the content, as well as his or her understanding of the student's thinking. Without this comfort level, 'letting go' becomes more challenging, as it is difficult to identify the importance of a particular discourse or reign-in a discussion (p. 7).

An essential element in achieving learner empowerment is shared authority. Barnett and Ramirez support this notion by noting students "must be partners in shaping their own educational experience. With the responsibility for making decisions, comes empowerment" (p. 8). An integral aspect of shared authority is that both the facilitator and the case report remain neutral. When a particular view is supported by either the facilitator or the case report, critical analysis or alternate theories or perspectives is inhibited.

Gunn and Mitchell (1982) describe a case method that employs participatory management techniques to empower learners. The method, called the self-actualizing case method (SACM), gives learners full authority and responsibility for carrying out presentation, analysis and learner evaluation. A brief description of SACM follows.

SACM uses a problem-solving itinerary to guide learners through the case study and to encourage group interaction, independent and constructive thinking and self-actualization in advancing problem-solving skills. The major parts of the SACM are discussed next. a) The scenario incorporates dialogue, role-playing or a skit performed by the leaders to introduce the case and establish rapport with participants. b) Situation analysis involves systematic mapping of all factors which focus on the problem. c) The problem statement is a concise, concrete, correct, yet unique statement of the case problem. d) Alternatives are broad courses of action that completely resolve the problem. e) Criteria are rules or standards used to select the best alternative. f) Best alternative is the course of action offering the best cost/benefit advantage. g) The final part of the SACM is the program, which identifies the goals, constraints/resources, strategies and tactics for implementing the best alternative.

The instructor's major role in SACM is to award points to participants based on the quality and quantity of their contribution and to be sure the problem-solving itinerary is followed. Although the instructor plays a passive role in case analysis, the instructor can influence case groups' performance. Gunn and Mitchell (1982) recommend the instructor explain case analysis procedure; meet with case leaders during case analysis to discuss relevant aspects of assigned cases; and interact with learners by making observations, expressing opinions and asking pointed questions when leaders are stumped or clearly off track.

In SACM, case leaders rotate among the class so that each learner has at least one chance to serve in this role. Once teams meet, each team appoints a coordinator who is responsible for assigning specific duties to each individual, for example, preparation of quantitative analysis, library research, visual aids, and the development of the theme for the scenario. The role of participants is to contribute to case analysis with timely, relevant, accurate comments, expert opinion drawn from secondary research and quantitative analysis where relevant.

Gunn and Mitchell (1982) recommend a "closed-loop" grading system be used with SACM. In this system, each learner has an opportunity to evaluate the performance of his/her peers. Case leaders assess the quality of performance by participants, and the participants evaluate the proficiency of case leaders. Participants earn gross points from the instructor, based on the quality and quantity of their participation in the case analysis.

Content Knowledge

In order to select and effectively use appropriate and realistic cases that achieve course objectives, the instructor must possess mastery in the content area under discussion. The instructor possesses the responsibility to ensure that students are grounded in the requisite principles addressed in the case. In the business field, effective case use normally requires mastery of general business concepts as well as subject matter expertise. Several scholars write that instructors should thoroughly internalize the case (Charon, 1976; Schwab, 1969) and be familiar with typical questions and debatable issues. Greenwood (1993) observes instructors can alter case content to accommodate students' interests and abilities.

Pre-Discussion Procedures

Several days before case discussion, the instructor can set the stage for case analysis by distributing the case and briefing students on analysis and discussion strategies. Depending on the background of learners, at this time, the instructor could also identify key issues or facilitate a class discussion to generate key issues.

Instructor Preparation Strategies

To prepare for case discussion, Grosse (1988) suggests the instructor first read the case thoroughly and write a logical analysis of the situation. The instructor should try to choose case topics in which he/she has some expertise; or, if that is not possible, consult colleagues with expertise in the case situation. When selecting cases, instructors should also consider the individual students in the class, their business backgrounds, academic strengths and weaknesses.

The instructor should review the case to ensure that theories, frameworks, principles and facts discussed in the case have been previously covered. If areas are found that have not been adequately addressed, the instructor could assign students to research weak areas. The instructor should try to predict the course of the discussion and prepare for a variety of responses by the students. Designing methods to achieve a high degree of student-to-student interaction and participation are fundamental to the case method.

Greenwood (1993) shares that it takes experience for students to examine a case from multiple perspectives. When beginning to use case studies, Greenwood advises that students view only one theory, set of principles, one perspective, and the like. With experience, they can expand the number of viewpoints they can examine.

To foster informal case discussion, instructors can encourage the use of the Internet. In addition, creative instructors can add visual or auditory imagery to cases, for example, visuals of key players, interviews with key players, visuals of the work environment, and the like.

Room Arrangement

The ideal atmosphere (Charan, 1976) is one that is large enough to seat everyone comfortably, yet small enough to encourage spirited, relaxed, informal debate. The author prefers movable tables and chairs to provide flexibility to enable both small and large group discussion.

Group Facilitation and Questioning Skills

The instructor plays an important facilitation role in continually encouraging student learning and cooperation through the complex case analysis and discussion process (Gragg, 1954). The instructor should facilitate student activity as students learn to assess, interpret and analyze the facts, and discuss cases. Students may need guidance in differentiating between fact and assumption, separating relevant from irrelevant, deciding who needs to know what, learning to organize their analysis, formulating their ideas, and communicating thoughts precisely and emphatically. Additionally, students need to learn the principles of group dynamics. For example, students need to learn how to command attention when it is their turn to speak, how to listen to others, how to motivate others to cooperate and participate, and how to approach in a constructive way those who are not contributing to the group.

To keep discussion flowing, Lachs (1984) suggests the instructor should summarize periodically and introduce carefully planned questions to highlight certain concepts. Questions such as "Where have we been?" "What do you think about that now?" or "Has anyone's decision changed?" Avoid manipulation or leading questions. Rather, Lachs (1984) advises to "provide students with a vehicle through which they can practice analyzing situations, drawing conclusions, and making decisions" (p. 15).

Whether large or small group discussion is used in case discussion, the instructor should appeal to all learning styles (Colbert, 1996). For example, for visual learners, the teacher can record student responses verbatim, using overhead projection devises or board work. Auditory senses are appealed to via verbal discussion, and kinesthetic senses are addressed through journal writing. Whether small or large group discussion is used, the instructor should focus discussion on relevant student experience. Before discussion, the instructor could conduct a quick review of key concepts, theories, and/or vocabulary to ensure students understand the case.

Typically, large group discussion is used for cases that involve more general issues. Colbert (1996) suggests the instructor write three questions on a visual display:

1. Who are the players (major and minor) in the case?
2. What are the issues?
3. How would you address/solve the issue/problems in the case? (p. 35-36)

Then, instruct students to individually respond to their questions in their interactive journals (this normally takes about ten minutes). Next, ask for volunteers to the first question, and so forth. As students respond to questions, encourage them to reflect on their own experiences and share how they have resolved similar situations. As a homework assignment, ask students to write their reactions to the discussion in the journal. In a similar approach, Douglas (1990) suggests posing a limited number of questions before students read and analyze the case, with closure facilitated by students answering the questions. Douglas reports that this relatively structured approach minimizes the tendency of students to "wander all over the map" in attempting to define the problem.

For more specific case problems, small group discussion is recommended. First, have students form groups of three to five students. Then, using the same three questions used for large group instruction, ask student groups to discuss each question in sequence. Each group should appoint a group leader, recorder, reporter, material handler, and cleanup specialist. After discussion, the reporters share responses with the entire class. Then, discussion is opened up for individual views. Finally, to enhance reflection and richness, students react to the case discussion in their journals. Greenwood (1993) suggests the instructor circulate among groups, asking questions and making comments where appropriate.

Assessment Strategies

Keep in mind that typically no right or wrong answer exists for cases. Given the abstract nature of case assessment, Greenwood (1996) suggests using a five-point scale to assess how well students met each of the following six criteria. For example, instructors could assess to what extent were students able to:

1. Apply accurately and fully a theory, model, or set of principles in analyzing the case.
2. Support the analysis fully with objectively cited data from the case.
3. Generate a course of action consistent with the analysis.
4. Generate courses of action that are practical or feasible in the context of the case.
5. State courses of action in a specific, operational form.
6. Organize the paper into a coherent and grammatically correct whole.

In addition, each group member could rate the contribution of other group members. The author suggests that the instructor review the criteria with students before applying the assessment to case studies, ideally providing a model of a sample case that meets the criteria.

Strategies to Facilitate Learner Success

To further increase the success of the case method, the instructor can provide direction to learners during case analysis. Certo and Peter (1988) identified four core steps found in most case analysis models: (a) define the problem; (b) formulate alternatives; (c) evaluate and compare alternatives; and (d) select and implement the chosen alternative. Certo (1989) maintains that these steps mirror the scientific decision-making process. Specifically, in this section of Chapter 2, the reader is provided with ideas to facilitate student learning in problem definition and analysis. This section concludes with examples of creative variations used successfully by case instructors.

Problem Definition. Nuttal (1993) suggests students begin case analysis by identifying the problems presented in the case. A problem is defined as a gap between a desired situation and an existing condition. Nuttal suggests students first identify "symptoms" that present evidence that problems exist; symptoms are facts showing that something is wrong, that a problem exists. Therefore, in this step, students list in detail all facts that indicate that something is wrong or that something can be improved. Rath (1981) suggests no more than five percent of the case time be spent on identifying facts.

Nuttal (1993) further suggests that important facts be separated from unessential facts and value judgements should be eliminated. If appropriate, the symptoms can then be separated into the various functional areas related to the case study (for example, planning, organizing, decision-making, etc.). Then, after all symptoms are listed and sorted appropriately, the problem statement is written, usually as a short paragraph. Although more than one problem statement may be derived from the case; students should concentrate on "major problems," those that explain many of the symptoms. The problem statement(s) usually explains the main cause of the symptoms of discontent. After students have carefully identified the problems, they can begin to analyze the case to arrive at alternative solutions.

Analysis. After identifying the problem, investigative questions might begin the analysis. Rath (1981) provides excellent examples of primary and secondary investigative questions. According to Rath, students might ask such primary investigative questions as "What is the product?" "What is the industry?" "What is the financial position?" (p. 109). These primary questions would be followed by secondary questions (Lombart, in Towel, 1969) such as "What is going on here?" (process) "What did X do?" (descriptive) "What might she/he have done?" (possibilities) "What will he/she do now?" (predictive) "What would you do?" (personal) and "What should be done?" (normative) (p. 190).

According to Rath (1981), case analysis should retain the bulk of students' time and effort, taking about 85 percent of case time. Conclusions flowing from the analysis should take about 5 percent of the time, and recommendations, 10 percent.

Creative Variations. Some authors suggest that case analysis can be enhanced through a number of strategies. For example, Greenwood (1996) shares an analysis model commonly used. After identifying the problems involved with the case, the

student thinks about the case from multiple points of view. The student uses professional knowledge (relevant principles or theories) to discuss the case, identifies courses of action that might solve the problem, determines the consequence that might follow from each course of action, and (after assessing each course of action), chooses the course of action to be followed and decides how to assess the effectiveness of the course of action. Greenwood (1996) suggests students be encouraged to operationally define solutions, for example, by explaining to the key player what to do, in clear, specific, reasonable terms.

In discussing the traditional use of cases for training and development, DuBrin (1992) observes two potentially exciting elements are missing: a) The opportunity for creative expression and b) a clear focus on a contingency point of view in dealing with managerial problems. For example, in the typical use of cases, the case analyst is required to present one solution to a problem or to present several alternative solutions to the same problem. This traditional approach does not provide practice in modifying an approach to a problem as the situation changes, incorporating the contingency approach. Given these shortcomings of the traditional case approach, DuBrin developed and extensively field-tested an approach to case analysis that emphasizes creative self-expression, a contingency point of view and refinement of word processing skills.

Dubrin's strategy, called CASA (computer-assisted scenario analysis), begins with learners copying or retrieving the case to be analyzed, using word processing. Then, learners answer the case questions or analyze the case in the traditional manner. They next insert a scenario of their own of about 100-200 words into the case, in italics. Next, case questions that would be affected by the new scenarios are re-answered (also in italics). Finally, several learners are asked to present to the rest of the class the scenarios they created and discussion is held about how these scenarios influence the case analyses. Dubrin noted the favorable reaction to CASA with managerial and professional trainees. Trainees liked inserting their own thinking in cases and playing a key role in shaping the case for analysis. One noteworthy problem with CASA is that 15 percent of trainees/college students have difficulty comprehending the basic concept of what it means to modify a case and then re-answer the case questions; and, keyboarding, if used extensively, can be perceived as busy work.

Summary

Chapter 2 provided ideas to assist novice and experienced case educators incorporate case studies effectively into their learning environments. Ideas for management/facilitation and learning strategies were shared to stimulate the instructor's creativity and imagination. Readers are encouraged to be imaginative and creative in the use of the case studies found in this publication. For example, cases might be used simply to stimulate discussion when introducing a new topic, without facilitating a full case analysis.

Chapter 3

Index Directory and Case Studies

Chapter 3 provides 74 case studies to address twelve content areas in business. Each case study was written by an experienced instructor to be used as an instructional tool in business classes from middle grade 7 through graduate level.

To assist the instructor in selecting and finding appropriate cases, the following index assigns each case a number. The assigned case number is used for both the case study (found in this chapter) and the discussion ideas for each case (found in Chapter 4). For ease of use, the index provides the following information for each case study: case title, case author, case page number, subject area, competencies, grade level, and industry type.

Subject Area Codes.

ACC	=	Accounting
BLW	=	Business Law
COM	=	Communications
ECN	=	Economics
ENT	=	Entrepreneurship
ETH	=	Ethics
FNC	=	Finance
HRD	=	Human Resource Development/Training and Development
INT	=	International Business
IS	=	Information Systems
MGT	=	Management
MRK	=	Marketing

Competency Area Codes.

Career	=	Career Development
Diversity	=	Diversity
ElecCom	=	Electronic Communication
Integ	=	Integrity
Listen	=	Listening
Math	=	Mathematics
OralCom	=	Oral Communication
ProbSolve	=	Problem Solving
Reading	=	Reading
Resp	=	Responsibility
Esteem	=	Self Esteem
Smgt	=	Self Management
Socblty	=	Sociability
WritCom	=	Written Communication

Industry Codes.

Private	=	Private
Public	=	Public
Govt.	=	Government

Grade Level Codes.

7-8	=	Middle grades 7-8
9-10	=	Secondary grades 9-10
11-12	=	Secondary grades 11-12
13-14	=	Post-secondary freshman/sophomore
15-16	=	Post-secondary junior/senior
GR	=	Graduate/Adult

Index Directory for Case Studies

Case No.	CaseTitle	Case Author	Case Page No.	Solution Page No.	Subject Areas	Competencies	Industry Type	Grade Levels
1	Credit Card Fraud	K. C. Kaser	19	140	ACC, BLW, ETH, IS	Resp	Private	11-12, 13-14, 15-16
2	Income Taxes	K. J. Kaser	20	141	ACC BLW, ENT, FIN	Integ, Resp	Private	9-10, 11-12, 13-14
3	Where Did the Scrap Come From?	G. N. McLean, & L. D. McLean	21	142	ACC, BLW, ETH	Integ, Resp	Private	11-12, 13-14, 15-16, GR
4	Internet Shopping	K. C. Kaser	23	144	ACC, BLW, ETH, IS	Integ	Private	11-12
5	TS Construction Company	R. Schramm	24	145	ACC, IS, MGT,	Oral Com, Writ Com	Private	11-12, 13-14, 15-16
6	The Expense Account Dilemma	J. Barton	25	147	ACC, MGT	Integ	Private	9-10, 11-12, 13-14
7	The Case of the Unprofessional Professional	M. Chalupa	27	148	BLW	Diversity, Resp, Socblty, Smgt	Private	11-12, 13-14, 15-16
8	A Lifetime of Risk	K. Shrader	28	150	BLW (Insurance), ENT		Private	11-12, 13-14, 15-1, GR
9	How About a Little Extra?	J. Schoen Henry	30	151	BLW, COM, ENT, MGT	Oral Com, Writ Com, Listen	Private	7-8, 9-10, 11-12, 13-14
10	Manufacturing Software Systems	C. Agneberg	32	152	BLW ENT, HRD, IS, MGT	Career	Private	13-14, 15-16

Case No.	CaseTitle	Case Author	Case Page No.	Solution Page No.	Subject Areas	Competencies	Industry Type	Grade Levels
11	The Computer Shop	C. Agneberg	34	153	BLW, ENT, IS	Integ	Private	11-12, 13-14, 15-16, GR
12	Legal, Ethical, or Morally Correct?	M. Chalupa	37	154	BLW, ETH, IS	Integ	Private	11-12, 13-14
13	The Case of the Sometimes Lazy Listener	J. Calvert Scott	38	155	COM OralCom	Listen,	Private	7-8, 9-10
14	The Case of the Questionable Writing	J. Calvert Scott	40	156	COM	Diversity, WritCom	Govt.	9-10, 11-12, 13-14, 15-16
15	The Korean HRD Connection	G. McLean	42	157	COM, HRD, INT	Diversity, WritCom	Public	11-12, 13-14, 15-16, GR
16	But it Was Only a Little Lie . . .	J. Barton	44	159	COM, HRD	WritCom, Career, Resp, Integ	Private	9-10, 11-12, 13-14
17	I Know I'm Right	J. Barton	45	160	COM	WritCom, Socblty	Govt.	11-12, 13-14, 15-16
18	Don't Put All Your Eggs in One Basket	J. Barton	46	161	COM	OralCom, ElecCom, Career	Private, Public	13-14, 15-16, GR
19	E-mail Training or Sabotage	J. Schoen Henry	47	162	COM, HRD, IS MGT	OralCom, Listen	Private	11-12, 13-14, 15- 16
20	The Promotion	J. Schoen Henry	49	163	COM, HRD, MGT	OralCom, Career, Esteem	Private	9-10, 11-12, 13-14
21	I Thought I Knew What It Wanted	J. Schoen Henry	51	164	COM, MGT	Resp, Reading, Writ	Govt.	Com11-12, 13-14, 15-16, GR
22	Choosing the Best Opportunities -- Opportunity Costs	R. Luft	53	165	ECN, HRD	Career	Private, Govt.	11-12, 13-14
23	The Case of the Vanishing Dream	J. Calvert Scott	55	167	ECN,	Resp, Math	Private	11-12, 13-14
24	Mr. Guy	K. J. Kaser	58	168	ECN, ENT, FNC MGT, MRK	Math	Private	11-12, 13-14, 15-16
25	The Great Defender	R. Luft	59	169	ECN, ENT HRD, INT	Diversity	Private	11-12, 13-14, 15-16, GR

Case No.	CaseTitle	Case Author	Case Page No.	Solution Page No.	Subject Areas	Competencies	Industry Type	Grade Levels
26	To Grow or Not to Grow -- Supply and Demand	R. Luft	61	171	ECN, ENT HRD, MKT	Career	Private	11-12, 13-14
27	The Case of the Taxing Matter	J. Calvert Scott	63	172	ECN	Math	Govt.	9-10, 11-12, 13-14, 15-16
28	A State's Moral Dilemma -- Promoting Gambling	R. Luft	65	173	ECN, ETH FIN, MKT	Integ, Resp	Govt.	11-12, 13-14, 15-16, GR
29	The Case of the Dastardly Deeds	J. Calvert Scott	66	175	ECN, ETH FNC, HRD, MGT	Integ, Diversity	Private	11-12, 13-14, 15-16, GR
30	To Buy or Not to Buy -- Importing	R. Luft	68	177	ECN, ENT FIN, INT, MGT, MKT	Diversity	Private	11-12, 13-14, 15-16, GR
31	Le Style Department Store	K. J. Kaser	69	178	ENT, FNC HRD, MGT, MRK	Socblty	Private	11-12
32	Horizon Training Services	C. Agneberg	70	179	ENT, HRD	Integ	Private	11-12, 13-14, 15-16
33	Marketing the Crown Royale	K. J. Kaser	72	180	ENT, HRD MGT, MRK	Prob. Solving	Private	12, 13-14
34	Techsystems	C. Agneberg	73	181	ENT, HRD, IS	Career, Integ, Smgt	Private	11-12, 13-14
35	Promoting a New Business -- Direct Mail Marketing	R. Luft	75	182	ENT, HRD, MKT	Career	Private	11-12, 13-14
36	Reaching New Heights	R. McCauley	76	183	ENT, HRD, MRK	Career	Private	11-12, 13-14, 15-16, GR
37	The Case of Maximum Earning	K. C. Kaser	77	184	ENT	Smgt	Private	9-10, 11-12
38	The Case of Following the Leader	H. Perreault	78	185	ENT, IS, MGT	Socblty, OralCom	Private	9-10, 11-12, 13-14, 15-16, GR
39	Will the Entrepreneurial Spirit Continue?	K. Shrader	80	187	ENT, MKG	Career	Private	11-12, 13-14, 15-16, GR
40	An Interpretation Everyone Can Understand	S. Lund-O'Neil	82	190	ETH, MRK	Integ	Private	11-12, 13-14
41	The Case of the Curious Partner	D. McAlister-Kizzier	83	191	ETH, HRD, IS	Integ, ElecCom	Private	11-12, 13-14, 15-16, GR

Case No.	CaseTitle	Case Author	Case Page No.	Solution Page No.	Subject Areas	Competencies	Industry Type	Grade Levels
42	The Case of Falling Off the Career Ladder	H. Perreault	85	192	ETH, HRD, MGT	Career, Socblty, Esteem, Smgt, Resp, Integ	Private, Govt., Public	9-10, 11-12, 13-14
43	The Case of Wrong Pricing	R. Luft	87	194	ETH, IS MGT, MKT	Integ	Private	7-8, 9-10, 11-12
44	The Missing Keys and Passwords	J. Schoen Henry	88	195	ETH, IS	Integ	Govt. Public	11-12, 13-14, 15-16, GR
45	Paying for Potholes	K. J. Kaser	90	196	FNC	Math	Govt.	11-12, 13-14, 15-16
46	A Tough Career Choice for Marcy	S. Lund-O'Neil	91	197	HRD	Career	Private, Public	9-10, 11-12
47	Choice is an Individual's Greatest Power	R. McCauley	92	198	HRD	Career, Diversity	Private, Public	7-8, 9-10, 11-12, 13-14, 15-16, GR
48	The Fast Track at City Hall	S. Lund-O'Neil	93	199	HRD	Career	Public	7-8, 9-10,11-12
49	Now What?	K. Shrader	94	200	HRD	Career	Private Public	11-12, 13-14
50	Responsibility as a Team Player	M. Chalupa	95	202	HRD, IS	Resp, Socblty	Private	9-10, 11-12, 13-14
51	A Day in the Life of a Systems Analyst	T. Lundgren	96	203	HRD, IS	Career	Private	13-14, 15-16, GR
52	If We Do All That is Necessary, the Odds Are in Our Favor	R. McCauley	100	205	HRD, IS	Career	Private	9-10, 11-12, 13-14
53	California Bound	R. Schramm	101	206	HRD, IS	Career	Private	9-10, 11-12, 13-14
54	Was it a Slip of the Tongue?	R. Luft	102	207	HRD, MGT	Resp	Private	9-10, 11-12
55	A Dog Wagging Tale	D. McAlister-Kizzier	103	208	HRD, MGT	Resp, Career, Socblty	Public, Govt.	11-12, 13-14, 15-16, GR
56	Nellie's Two Personalities	M. Chalupa	105	210	HRD, MGT	Socblty	Public, Govt.	11-12, 13-14, 15-16
57	Technically Qualified but Lacking Self-Management Skills	M. Chalupa	106	211	HRD, MGT	Smgt	Public	9-10, 11-12
58	What Went Wrong?	J. Barton	107	212	HRD, MGT	Socblty	Govt., Public	11-12, 13-14, 15-16
59	The Case of the Changing Transcript	K. C. Kaser	109	213	IS	Integ	Public, Govt.	9-10, 11-12

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Case No.	CaseTitle	Case Author	Case Page No.	Solution Page No.	Subject Areas	Competencies	Industry Type	Grade Levels
60	Information Systems Training Corporation	R. Schramm	110	214	IS	Prob. Solving	Private	11-12, 13-14, 15-16, GR
61	The Problems With Database	T. Lundgren	112	215	IS	Elec Com, Oral Com, Listen, Prob. Solving	Private	11-12, 13-14, 15-16, GR
62	Information Systeme Alternatives	T. Lundgren	115	217	IS	Prob. Solving	Private	9-10, 11-12, 13-14, 15-16, GR
63	Workflow Reengineering	T. Lundgren	117	219	IS, MGT	Prob. Solving	Private	11-12, 13-14, 15-16, GR
64	Talent and Discipline	T. Lundgren	120	221	IS, MGT	Prob. Solving	Private	11-12, 13-14, 15-16, GR
65	Computer-Assisted Systems Engineering	T. Lundgren	122	223	IS, MGT	Prob. Solving	Private	11-12, 13-14, 15-16, GR
66	Joint Application Development	T. Lundgren	124	225	IS, MGT	Prob. Solving	Private	11-12, 13-14, 15-16, GR
67	The Value of Systems Analysis	T. Lundgren	126	227	IS, MGT	Prob. Solving	Private	11-12, 13-14, 15-16, GR
68	Into the Information Age	T. Lungdren	128	229	IS, MGT	Prob. Solving	Private	11-12, 13-14
69	Lakes Start – Project Management	B. O'Connor	130	231	IS, MGT	Prob. Solving	Private	13-14, 15-16, GR
70	Sampling Required	T. Lundgren	132	232	IS, MKG	Math (Statistics)	Private	9-10, 11-, 13-14, 15-16, GR
71	The Hiring Dilemma	K. C. Kaser	134	233	MGT	Diversity	Public, Govt.	13-14, 15-16, GR
72	Don't Try toChange Me -- Work on Yourself	S. Lund-O'Neil	136	234	MGT	Esteem	Public, Govt.	7-8, 9-10, 11-12, 13-14, 15-16
73	To Manage or be Managed	S. Lund-O'Neil	137	235	MGT	Resp, Smgt	Private	9-10, 11-12, 13-14
74	Where Do I Find A Telephone Card?	G.N. McLean, M.D. McLean, & L.D. McLean	138	237	MKT	Prob. Solving	Private	11-12, 13-14, 15-16

Case Number 1

Credit Card Fraud

by Karen C. Kaser, Assistant Professor, University of Houston-Downtown

Bob White is a computer programming major at a community college. While attending college, Bob has been working as a salesperson in the hardware department of a major department store. Bob has been very successful at both school and work. He has been recognized for excellent work by being promoted three times in a two-year period in the department. At age 20, he is the youngest department head at the store. Bob also has done exceedingly well at school. His internship in the computer program department at Bank One has gone so well that the bank has guaranteed him a job when he graduates from college. Bob is trusted with many responsibilities at both the bank and the hardware department.

Bob has received a credit card with a limit of $1,000 from the department store where he is employed. This is his first credit card, and he is enjoying the additional purchasing power. Bob has made some large purchases on his credit card and has reached his credit limit. Ron, Kelly, and Pat are Bob's friends who also have department store credit cards from the store where Bob works. They come in often when Bob is working to make purchases.

Bob's proficiency with the computer allows him to get his work done ahead of schedule. He often "plays" with the computers when he is finished with his work. He has found many loopholes in the system at the department store. One slow day at work, Bob is using the computer and discovers how to acquire the current bills of credit card customers. Bob finds out it is relatively easy to change account balances by keying in fictitious cash and check payments. Bob clears off a big part of his charge account and totally clears the accounts of Ron, Kelly, and Pat. No one in the store sees Bob inputting information to clear the bills. Bob's friends are extremely pleased with his performance, but are concerned that his actions might be discovered.

Bob reassures his friends that no one knows about the loophole in the system and that they should feel free to make purchases with their credit cards. Bob wonders if the bank's computer system has similar loopholes.

1. Who are the key actors in this case?
2. What is the dilemma in this case?
3. Are one or more people guilty of a crime? If so, who?
4. Should he be caught, what is likely to happen to Bob's future career? What other consequences might Bob encounter as a result of his actions?
5. What procedure can the store implement for future protection from this type of activity?
6. Why do you think Bob responds the way he does in this case? What is his motivation?
7. What are ethical concerns in this case?
8. Who can be held accountable for the losses incurred by Bob's actions?

Case Number 2

Income Taxes

by Kenneth J. Kaser, Marketing Education Coordinator, Dulles High School, Sugar Land, TX

Bill Gold is employed part-time in the garden shop of a major retail chain located in a rapidly growing city. He works about 20 hours a week at the garden shop and the rest of the time he runs his own lawn care service business; Bill does all the work himself and has built a loyal clientele. His business has been very successful due to his quality work and high demand. At least 60 percent of Bill's customers pay cash for his services and the other 40 percent pay with checks.

Bill does not believe that the federal government's tax system is fair to the working man and woman. He feels that the system favors the wealthy and puts the greatest burden for taxes on the middle-class taxpayer. Therefore, Bill feels that the less tax he pays, the fairer the system becomes for him.

Bill has decided that, since no record of the cash payments to his business can be traced by the federal government, he will not report the cash payments when he files his income tax returns. He is more concerned about reporting payments received in the form of checks. Those customers may decide to deduct their lawn care as a housing improvement on their income tax returns. Thus, Bill reports only the income received as checks on his 1040 form.

Bill's wife, Shirley, works full-time as a hair stylist for a small local styling salon. She is paid a set salary plus a percentage of the hair care products she sells her customers. Shirley has many repeat customers who reward her with tips for a job well done. Most of her customers tip her with cash. Since the cash tips cannot be traced by the federal government, Shirley reports only a small percentage of the tips on her 1040 form.

Bill also believes that the Social Security system will not exist by the time he is ready to retire. He feels that citizens should be allowed to save their own money for retirement instead of being required to make social security payments from their income. He grudgingly accepts that social security taxes must be deducted from his garden shop paycheck. However, he does not pay social security on the income he makes from his lawn care service.

Shirley is concerned that the IRS will discover that she and Bill are not reporting all their income and that the government will expect payments for social security from Bill. One day, Shirley expresses her concerns to Bill. She remarks, "Bill, I am quite concerned that the IRS will audit our income tax returns this year. Your business has grown quite rapidly this year, and they might decide to trace all of our earnings."

Bill reassures Shirley by saying, "How can the government keep accurate records on millions of people?" He goes on to say that records of cash payments cannot be traced, and even if the IRS catches on to his scheme, he would be able to produce records of enough expenses and deductions from his business to offset any income received. Shirley accepts Bill's explanation but still worries that what they are doing is unethical and that, sooner or later, they will be audited and made to pay back taxes.

1. How is rationalization involved in this case? What are the potential consequences of the rationalization?
2. Do you think Bill is correct in his assumption about social security? Why or why not?
3. Do you agree with Bill that government will have no record of Bill's cash earnings?
4. What are the procedures a self-employed person should follow to pay taxes during the year?
5. What are the legal issues related to this case?
6. What are the ethical issues related to this case?
7. If you were Shirley's best friend and she asked for your advice on what to do regarding this dilemma, what would you recommend?

Case Number 3

Where Did The Scrap Come From?

by Gary N. McLean, University of Minnesota, St. Paul and Laird D. McLean, Andersen Consulting, Minneapolis

Tom Baker was a second-year business student at the Royal Ontario University in Stratford, Ontario, Canada. He was working part-time in the office of Stratford Salvage and Trading Company to support his university education. Toward the end of the school year he was approached by the president of the company, Malcolm Smith, who asked him if he would be willing to move to a start-up company in which Malcolm was a part owner. Spartan Alloys was a "junk yard" specializing in high temperature alloys, "junk" that has high value when recycled. Tom was offered a promotion to Office Manager, with responsibility for keeping all of the books under the direction of an independent Chartered Accountant (CA); a CA in Canada is similar to a Certified Public Accountant (CPA) in the United States. This seemed like a wonderful opportunity, so Tom agreed. He began work there the next week, working full-time during the summer months and halftime during the academic year throughout the rest of his university years.

Tom worked closely with the two owners, Malcolm and Sidney Jones; the secretary, Anne; the yard supervisor, Robert; and the owner of the company that provided transportation for Spartan Alloys, Frank, owner of Frank's Transport. Various companies would ship scrap metals to the company, where it would be unloaded and weighed under Robert's supervision. Robert would record on a receiving bill the weight and type of material received. He would then bring the form to the office. Tom would price the purchase based on existing purchase orders and then send a copy of the receiving bill to the supplier. The supplier would then send Spartan Alloys an invoice. Tom would compare the invoice with the receiving bill; if it agreed, Anne would prepare a check that would be signed by one of the two owners and mailed.

Under Robert's supervision, the scrap metal would be loaded on to one of Frank's trucks and shipped to Atlas Steel Mill in Welland, Ontario. The receiving clerk would weigh the full truck, and then weigh the empty truck, sending both figures back to Spartan Alloys on a receiving slip via the driver. Tom would then prepare an invoice that would be typed by Anne and mailed to Atlas Steel Mill. They would compare the invoice with their receiving records and send a check. Tom would compare the check with the invoice and, if it agreed, deposit it. In both cases, if there were discrepancies, Tom would be responsible for determining the reason for the discrepancy. Credit or debit slips would then be prepared, as appropriate.

Because of a lack of transportation to the office site and yard, Robert, Anne, and Tom often rode to work and home together in Robert's pickup. Naturally, conversations often turned to business matters. After several weeks, it became clear that Robert talked about shipping less than full loads containing material different from that listed on Atlas Steel Mill's receiving slips. At the same time, the CA and Tom were working to reconcile inventories and found that it was not possible to do. Many more tons of material were being received by Atlas Steel Mills than were being purchased from suppliers or being shipped from the yard. Further, much cheaper material was being received in Spartan's yard than was being shipped to Atlas.

As the evidence of apparent fraud accumulated, Tom confronted Sidney, the co-owner with the most technical knowledge about metals. Sidney's explanation was that the trucks would stop on the way to the Mill to pick up additional scrap that was of such high quality that, when melted down by the mill with the material from our yard, yielded the quality of metal that was on the mill's receiving slip. Rather than listing all of the metals involved, the receiving clerk at Atlas simply entered a gross figure for the material that would result when the shipment was melted down. Tom knew that the trucks did pick up additional material along the way, and invoices were received for high-grade material that never physically was brought into Spartan's yard.

Sidney's explanation was plausible, though Anne, Tom, and Robert were not totally convinced that the explanation made sense. More direct questions were asked of Frank and his drivers, as the three tried to figure out what was going on. Their suspicions deepened and were confirmed when the CA again tried to reconcile the inventory at the end of the second year and was not able to do so. It was clear that something was wrong. It was just not possible to sell more metal than was being purchased.

1. What were the responsibilities of the CA in this case? What should the CA have done differently?
2. What accounting principles were violated by Spartan Alloys?
3. What accounting principles were violated by Atlas Steel Mills?
4. What more could Tom, Anne, and Robert have done?
5. What should Tom, Anne, and Robert do now?

What Happened Next?

After lengthy discussion by Anne, Tom, and Robert, with encouragement from the CA, Tom contacted the RCMP (Royal Canadian Mounted Police). They took the relevant information and told Tom that he and the others should continue to work as normal and that the RCMP would investigate.

This was done; the third year of employment ended. Tom graduated and moved to Vancouver, British Columbia, to attend graduate school. About six months later, he received a subpoena from the RCMP to appear in court, where Malcolm, Sidney, and the receiving clerk from Atlas Steel Mills were being charged with $2 million in fraud. Tom flew to Ontario for the court case; he was on the witness stand for two days. All three were found guilty.

Six months later, Tom appeared in court as a witness again as Malcolm, Sidney, and the receiving clerk appealed their convictions. Before the court case, Malcolm offered to pay all of Tom's future educational expenses if he would testify that Malcolm's involvement had been financial only, and that he was not involved in the ongoing business decisions. Tom refused. The prosecution indicated that they now believed that the fraud had exceeded $5 million. Their convictions were upheld. Malcolm received probation; Sidney received a six-month jail term. The receiving clerk received a one-year sentence. The CA lost his credentials to practice.

What are your reactions to these outcomes?

Case Number 4

Internet Shopping

by Karen C. Kaser, Assistant Professor, University of Houston-Downtown

John is very proficient with the computer. He has discovered ways to access many types of information, both private and public. Lately, he has been using the Internet to order merchandise. When he orders the merchandise over the Internet, he uses his credit card to pay for the merchandise.

John especially enjoys using the Internet to purchase merchandise. John used to enjoy going on all-day shopping sprees to the local malls, but is no longer able to because of a disability. John is extremely pleased because he now can shop with ease from his home placing his orders directly on the Internet for merchandise from such high-end stores as Saks Fifth Avenue, Neiman Marcus, and Nordstrom. He feels he can trust the vendors he orders from on the Internet.

Unfortunately, another Internet surfer has acquired John's credit card number. His last VISA statement showed $800 in purchases that John knows he did not make. The statement showed that the purchases were made over the Internet for merchandise from Value TV. John decides to call Value TV to find out where the merchandise was sent. John's call to Value TV raises more questions than it answers. The merchandise was sent to several different P.O. box numbers in the state of New York. However, these P.O. boxes no longer exist. John also calls the customer service department at VISA to report the unauthorized purchases. He becomes extremely upset when VISA refuses to remove the unauthorized charges. In the past, VISA has sent warnings to its customers that making purchases on the Internet with credit cards is not secure and recommends that this practice not be used. They tell John he should have known that this method of purchasing merchandise was not safe and that he is responsible for the charges.

John is totally frustrated that he has gotten no assistance from VISA in resolving the unauthorized charges. He decides to call the Better Business Bureau and the Action Editor for the local newspaper. While these organizations express their sympathy, they can do nothing to assist him. He finally decides to take the matter public, so he calls the local TV station's Consumer Reporter. The situation is reported on the local station and is picked up by stations across the country. VISA decides that the negative publicity being generated by this problem is not worth the $800 in charges and removes the charges from John's bill. John decides that he wants to do something to prevent incidents such as the one he experienced from happening to anyone else. He writes to Congresswoman Joy Chen and asks her to pass legislation to regulate the methods by which purchases can be made over the Internet. Congresswoman Chen is sympathetic to the cause and wonders what she can do to remedy the problem.

1. Who are the key actors in this case?
2. What issues are raised by the described technology in this case?
3. If you were Congresswoman Chen, what step would you take to control the illegal activity on the Internet?
4. Is too much private information readily available to users on the Internet? If so, what could you do to prevent this type of incident from happening to you?
5. Was John correct in assuming VISA would absorb the cost of the $800 credit card fraud?
6. If you were John, what actions would you have taken to resolve the problem?

Case Number 5

TS Construction Company

by Robert M. Schramm, Professor, University of Wisconsin-Whitewater

Tom Sarkley started TS Construction in 1974 by offering to lay concrete for a friend's new driveway. After completing the driveway, Tom got the idea that he could bid on some small concrete jobs offered by the city. From this humble beginning Tom has built a concrete construction company that repairs concrete streets and highways in five Mid-western states: Ohio, Wisconsin, Illinois, Michigan, and Indiana.

Each state has two crews working on various projects. Each crew has a foreman. The crews and their foremen are very loyal to the company, are high school educated, and in general like to work and play hard. Gary and Paul are the territorial managers responsible for overseeing all projects in the five states. Although their duties often overlap, Gary is primarily responsible for the jobs in Illinois and Wisconsin, while Paul is primarily responsible for the jobs in Ohio, Michigan, and Indiana.

Each of the project foremen call in to TS Construction Headquarters located in Madison, Wisconsin, on Monday morning and verbally give their territorial manager a progress report on the job on which their crew is working. These reports are very "loose" and do not provide consistent information. Furthermore, the verbal report format has caused some problems because customers will often call with questions on the project and the lack of written documentation does not allow anyone but the specific territorial manager to respond. In addition, the territorial manager responds to customers based on his memory of the conversation rather than a written document that can be referred to if needed. This has caused several customer complaints concerning miscommunication.

Tom has called Computer Systems Consulting to ask for help with this problem. Jake Baxter was assigned the consulting job. In the first meeting Tom described the problem and made it clear that although he realized a change was needed, the crew foremen were likely to fight any change from the current reporting system.

After talking with Tom, Jake made the following preliminary recommendations for alternative solutions:

1. Each crew foreman could write a progress report and send it to the home office via next day air service.
2. Each crew foreman could call in his progress report to a recording system which could then be transcribed by a secretary and given to the territorial manager.
3. Each crew foreman could write a progress report and fax it to the company headquarters.
4. Each crew foreman could be given a portable personal computer and modem. The reports could be typed using word processing software and then sent through the modem to the home office.

After the meeting, Tom was left to ponder his situation.

1. What are the advantages of each alternative? What are the disadvantages of each alternative?
2. What is the estimated fixed cost of each alternative? What is the estimated variable cost of each alternative?
3. What special training would you anticipate for each alternative?
4. Which alternative would you recommend Tom select? Why? Describe how you arrived at your recommendations.
5. What can Tom do to ease the transition for the foremen to the new reporting system?
6. If Tom wanted to develop a form to simplify the progress reports, what should the form include?
7. What other recommendation(s) do you suggest to solve the problem described in the case? Describe how you arrived at your recommendation(s).

Case Number 6

The Expense Account Dilemma

by Janice K. Barton, Associate Professor, University of Nebraska at Kearney

The XYZ Company is a major manufacturer and distributor of a full line of agricultural equipment and commercial trucks. Its equipment line is marketed nationally and internationally. To fully develop its markets, the company owns and operates company stores, which are responsible for selling and servicing equipment at the local level.

The organizational structure of the company includes the corporate headquarters, regional offices, district offices, and company stores. Each company store is initially responsible to its district office. The district office reports directly to its regional office, and regional offices report to the corporate headquarters.

Keith is hired as a sales representative in a company store located in a small Midwestern farming community. As part of the training program, Larry, the store manager, and Jim, the store auditor, spend considerable time going over the employees' manual and formal operational guidelines with Keith. These guidelines give directions to employees concerning all company policies. Since the organizational structure of the corporation is complex, the guidelines furnish very specific information concerning all areas of operations.

After approximately six weeks of employment, Keith is experiencing an unexpected sales volume. He is the top sales representative in the store and is complimented by Larry on his success.

Everything is going so smoothly that Keith is surprised when Larry tells him that Hal, the district manager, will be at the store the following Tuesday and would like to talk with him. Keith is concerned because he knows that Larry and Jim are the only persons in the store who interact with district personnel.

With some trepidation, Keith shows up for his meeting with Hal. Hal is a large, gruff man who is used to throwing his weight around. He manages by intimidation. After the introduction and some brief pleasantries, Hal gets down to business. He informs Keith that during a bimonthly audit of the store's records, questions were raised by the regional auditors regarding Keith's expense accounts and the way his expenses were recorded.

Keith is puzzled. He knows that in submitting his expense accounts, he has followed the policy guidelines exactly as they are written. The company policy manual states that sales representatives are to provide receipts, whenever possible, for all road and associated customer expenses. However, daily expenses of up to $100 are allowed under certain circumstances with no verification by receipts.

In the six weeks that Keith has been on the job, he has submitted expense accounts for only his actual expenses and has been very careful to obtain receipts for even the smallest expense item. He includes all receipts with his weekly expense account, which is submitted to Jim. At this point in the conversation, Keith is at a loss to understand the problem.

Hal goes on to say that the regional auditors are wondering why only one sales representative out of the entire organization is able to keep such specific expense records when everyone else is claiming the $100 daily minimum without submitting receipts. Hal says it is too time consuming for sales representatives to keep such detailed records and for the auditors to check these records. Sales representatives and administrators may claim daily expenses of $100 without supplying receipts. Although this practice does not follow the formal company policy, informally this is what is being done.

Hal jabs his finger at Keith and tells him that from now on he will claim the $100 daily minimum even if he hasn't spent that amount. Any expenses above $100 should be verified with receipts. Keith truly believes that Hal's directive is absolutely counter to company policy and is not only cheating the company but is also out-and-out theft. With some degree of fortitude, Keith makes his concerns known and is immediately informed by Hal that Keith's evaluation of the situation doesn't really matter. If Keith values his position with the company, he will submit his expense reports as directed.

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1. Should Keith compromise his values and submit falsified expense reports as he has been directed to do? Why or why not?
2. What do you think Keith's future actions will be regarding the expense accounts?
3. What are the district manager's values?
4. What role should the store manager and auditor play in this situation? Provide a rationale for your response.
5. Should Keith "blow the whistle" and report this rampant expense account abuse to corporate headquarters? Why or why not?
6. What circumstances do you think might lead to such abuse in an organization? What procedures could be implemented to control such abuse?

Case Number 7

The Case of the Unprofessional Professional

by Marilyn R. Chalupa, Assistant Professor, Ball State University

Gretchen Reed has been a legal secretary for eight years in a prestigious law firm in Sioux City. The firm was started by the four partners and gradually acquired twelve associates. There are eight legal aides and six legal secretaries. Each legal aide works for two attorneys and each legal secretary works for three attorneys. One of the legal secretary's primary responsibilities is to serve as receptionist for the office, to work for the junior associate attorney, and to perform general clerical tasks designated by the office administrator, Michael Kuyper. Gretchen is the receptionist and works for the junior associate attorney and the office administrator.

Some of Michael's duties include hiring all of the employees except the attorneys, purchasing supplies, scheduling vacations, and doing the annual performance review of the legal secretaries and aides. The partners established high standards and ethics ten years ago and Michael agrees and supports those standards and ethics.

Gretchen has helped five of the associates start as junior associates. She is excellent at helping them to learn the routine of the firm and adopt the high standards and ethics established by the firm. She is very patient, kind, helpful, and always professional. Her performance reviews have been the best every year. For these reasons, she was asked by the partners to remain in that position to work with the new junior associate attorney. For her efforts, she is rewarded with prestige and a generous salary. Gretchen accepted the offer to continue to work with the new junior associate attorney.

Vernon Beatty, the new junior associate, is in his early thirties, handsome, and single. In the past few months he has suggestively hinted to Gretchen that he would like to date her. She has politely ignored the hints, laughed them off, and hinted that she was too old for him. Lately, however, Vernon was direct in asking her for a date. Even though she was not interested, she felt uncomfortable turning him down. She knew it would be difficult to work with him if they dated. After each request, she would feel uncomfortable and he would be very demanding and short-tempered with her. He finally quit asking her and tried to date the other legal secretaries and the four female aides. Much to his dismay, they all turned him down. He blamed it all on Gretchen who he thinks has told the other secretaries and aides that he had asked her out. Even though Vernon finally stopped asking her out, he continued to be demanding and short-tempered with her and blamed her for things that were supposedly said about him. In fact, one of the other secretaries told her that Vernon had made some unkind and untrue remarks about her performance to one of the partners. She had never made any negative comments about Vernon or any junior associate nor had she talked to anyone about his behavior.

Michael, Gretchen's immediate supervisor, noticed that Gretchen's performance was not the usual high standard and that she was not her usual self. In fact, Michael made a note in Gretchen's file to talk to her about an incident he witnessed between her and Vernon that was not characteristic of Gretchen's usual behavior. He decided to observe her interaction with the other people in the office to see if there was an explanation for this change in Gretchen's attitude and behavior or if this change was just toward Vernon.

1. Discuss how appropriately Gretchen handled Vernon's hints and requests for dates.
2. If Gretchen asked you for advice after Vernon first approached her for a date, what advice would you give her?
3. Why do you think Gretchen's behavior and attitude changed?
4. If you were Michael, what would you say to Gretchen?
5. If you were Michael, what would you say to Vernon?
6. If you were Michael, whom else would you talk to about this situation?
7. Is this sexual harassment or flirting?
8. If you were Gretchen, what actions would you take in this situation?
9. If the genders of Gretchen and Vernon were reversed in this case, would your answers toany of the above questions be different?

Case Number 8

A Lifetime of Risk

by Kurk Shrader, Business Teacher, Elmwood-Murdock High School, Nebraska

Ramos dreamed of running a business. He demonstrated entrepreneurial characteristics throughout his youth; in fact, as a child he operated several lemonade stands during the hot Oklahoma summers. Later, Green Cut, a lawn- service business flourished. His income from this business venture maintained his high school expenditures, including the operational costs of running his car, an older version automobile with high mileage. One business venture followed another; most were successful because of Ramos' willingness to work long hours, ability to give good service, and his willingness to take risks and reinvest his previous earnings.

When he graduated from high school, Ramos wanted to be self-employed; but financial considerations limited his business ventures. He borrowed money to attend the local community college, and two years later earned an Associate's Degree in electronics. While attending college, he remained single and lived in rented housing. He worked at a local computer store, Bits & Bytes, where he was responsible for clerking and making some computer repairs. Upon graduation from college, he stayed on as a computer technician. With his full-time employment came full-time benefits including vacation, retirement, and health insurance benefits.

At age 24, Ramos remained employed at Bits & Bytes. After college he married and had one child. They lived in a large metropolitan community in a home that he and his wife Donita purchased for $75,000. They owed $40,000 on their home; and Ramos continued to make payments toward the $2,500 balance he owed on his college fund. Ramos had aspirations of being self-employed but remained on as a technician in hopes of acquiring Bits & Bytes when its owner retired. Donita was employed part-time at a local real estate office as an administrative assistant.

In anticipation of their second child, Ramos and Donita finally traded their older model automobile for a mini-van. Although the van was three years old, it had low mileage and appeared to be in excellent condition. The second child arrived.

Bits & Bytes' current proprietor decided to retire and offered the business to Ramos. A local banking establishment agreed to lend Ramos $120,000. Ramos continued to owe $25,000 on his home and $3,000 on his car. The student loans were paid. As the new proprietor, Ramos decided to maintain most of the same business practices that were being implemented at Bits & Bytes. The retail establishment had a storefront located in a busy business district; however, most of the business was conducted by technicians who traveled to the customer's home to make computer repairs. The store owned three vans—two newer ones and one with considerable body damage and high miles. Eleven people were employed either on a part-time or full-time basis. At age 32, Ramos attained his career aspirations.

Within the next 30 years, Ramos' and Donita's business prospered. They became financially comfortable and were able to pay off their loans. The two children were able to attend college and move from home. The business expanded and was now available at three sites. More than thirty individuals were employed by Bits & Bytes.

Ramos started to consider retirement and decided to wait until age 65. At that time, he sold his business to one of his children, and he and Donita started their retirement. They also sold their home and moved into a condominium.

Throughout their lives Ramos and Donita were relatively healthy. Neither had major health problems, but they did experience typical medical expenses especially when they reached retirement age. They enjoyed retirement in Oklahoma and traveled the greater United States.

Like Ramos and Donita, everyone faces risks in his or her daily lives. With insurance, there are opportunities to protect against loss. At different points in one's life, risk may vary. Use what you know about insurance to reflect and analyze the insurance needs of Ramos and Donita.

1. Develop a time line that is representative of Ramos' life. On the time line, identify the risks that Ramos assumes.
2. What insurance options do you recommend for each of Ramos' risks?
3. What insurance changes (if any) would you propose if Ramos and Donita did not have children?
4. What insurance changes (if any) would you propose if Ramos was self-employed but did not have any employees?
5. What insurance changes (if any) would you propose if Ramos did not have a store front and only had a traveling repair service?
6. What insurance changes (if any) would you propose if Ramos had been a position where he did not have to borrow money?
7. Propose three changes to the case scenario. How do your changes affect Ramos' insurance needs?

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Case Number 9

How About A Little Extra?

by Janice Schoen Henry, Associate Professor and Chair, Department of Information Management Systems, College of Applied Sciences and Arts, Southern Illinois University, Carbondale

Frank is a young entrepreneur who has just started his own landscape gardening business. He didn't really intend to make this his career, but things worked out that way. He had worked cutting friends' and neighbors' lawns while he was still in high school. His reputation spread as a dependable, hard-working young man who could be trusted to get the job done whether or not the owner was at home.

From this start, his interest in working out-of-doors, and the opportunity to attend the local university, he decided to make Landscape Architecture his major and, hopefully, his life career. He hadn't intended to stay in his hometown after graduating, but it had worked out that way. He had applied for several internships at arboretums and park districts in large cities, but found out that such jobs are very hard to get. Despite his knowledge and abilities, he stayed to work locally where his reputation was already set. During the two years after graduation, he has taken on more yards, and at times had to use extra help when the workload became heavy.

He hasn't formally established his business by incorporating or advertising; he hasn't had to because word-of-mouth has kept him busy with customers. He is doing well enough that he has taken out a loan to buy a professional, sit-down mower and a roto-tiller. He hopes to get additional equipment as his business grows. One of his first areas of expansion has been to offer seasonal lawn servicing and landscape plantings. In addition to mowing and tilling gardens, he is adding seeding and fertilizing on an annual basis, treatment for undesirable pests and plants, and enhancements to the landscape design of existing lawns and grounds with plants and garden ornaments. His method of gaining the additional business is to discuss with customers what work needs to be done or how improved landscaping would improve the appearance and value of their property. If they are interested, he gives them a price in the form of an oral agreement.

Frank is very careful to listen to the client's wishes and to discuss carefully the implications of their oral agreement for any additional work. However, he is becoming increasingly frustrated with this process because it is apparent that many of his customers do not listen as carefully in return. One problem is that customers often ask for additional work beyond the scope of the agreed-upon price while assuming that it will not cost more. Another problem arises when customers do not follow directions for the continued care of the yard and plants after Frank has performed his part of the agreement.

One example is Mr. Hart, who often comes out while Frank is working on his lawn and says, "Oh, by the way Frank, when you're through mowing, how about cutting those wisteria vines back? It should only take a few minutes." The few minutes turn into an hour and a half. Mr. Hart has been a long-time customer, and Frank does not want to make an issue of the extra work, but the next week Mr. Hart says, "My wife bought these geraniums at the Farmer's Market. It shouldn't take you long to plant them. I'll show you where they should go."
Frank interjects, "It will take longer than a few minutes, Mr. Hart. Our agreement was...."
Mr. Hart interrupts. "But you're such a good worker and so fast. It won't take you long."

Another example is Mr. Hasty. Frank had suggested some plantings for his yard. As a package deal, Frank would buy the plants wholesale and give Mr. Hasty a better-than-retail price. Frank planned to make his money on a slight mark-up of the plants and on the labor charged for planting them. As an added inducement, he offered a one-year guarantee to replace any plants that did not live. He emphasized, however, that Mr. Hasty had the obligation to care for the plants properly by watering them twice weekly and fertilizing them monthly.

Mr. Hasty agreed, but obviously did not listen to the instructions for care of the plants. He bought over $500 worth of plants from Frank, apparently thinking that the plants would take care of themselves. Mr. Hasty mows his own yard—for the exercise, he is fond of telling Frank—so Frank did not see his yard until the next growing season. The plants were mostly dead; the few that lived were in dismal condition.

"You assured me that these were high-quality plants, Frank. Just look at them now!"

"They were excellent plants," Frank replied, "but it's obvious they weren't well-tended. It appeared that they died of thirst and malnutrition."

"But you guaranteed them. I expect you to live up to your part of the bargain, Frank. I want them replaced right away with healthy plants, or I'll report you to the Better Business Bureau."

Frank wants his business to succeed and enjoys working with most of his customers. But a few incidents like these damage his small profit margin to the point that he gets discouraged. He wants to be treated like a businessman rather than a grown-up kid who still cuts yards for spending money.

1. What can Frank do to make his business a success?
2. Are Mr. Hart and Mr. Hasty the type of people you could expect to meet every day in business? Think of some people you know who are like this.
3. How were Frank's problems the result of people not listening?
4. Should Frank consider leaving his hometown to get away from his "neighborhood kid mowing lawns" image? Why, or why not?
5. How can Frank get people to pay more attention to what he is saying? How can he be certain that he is heard?
6. How would you have answered Mr. Hart and Mr. Hasty when they asked for the extra help?

Case Number 10

Manufacturing Software Systems

by Craig A. Agneberg, President, Blue Sky Interactive

Manufacturing Software Systems (MSS) is a leading international mainframe software development company located in the United States. MSS has been in business over 20 years and had in excess of $155 million in sales this past year. Continued increases in sales and profits are forecasted for future years. Over the past two years, their software product line has been re-engineered for the client/server computer market.

The revamping of the software was necessary when their sales and revenues declined significantly. MSS needed to begin looking at ways to streamline the company. MSS instituted a 10 percent wage cut across the board for employees. Each employee was asked to cut back the 40-hour workweek to 36 hours. Then, the situation got a little more tenuous and tougher decisions needed to be made to help the company cut its losses. A large-scale downsizing occurred. MSS went from 1,500 employees to about 1,000 over the course of the next two years. It was the first time that MSS had ever laid off employees. The feeling of MSS being a family-oriented company with lots of employee goodwill and loyalty came to a screeching halt.

Bill manages Customer Services, which provided consulting and training to MSS clients. He was a hard-working, visionary manager who had successfully managed his group to a profit over the past two years. He made decisions and stuck with them even if they weren't the most popular decisions. He knew that the training materials were outdated and that MSS clients were asking for less instructor-led classes. However, the revenue generated by these training classes amounted to $1,500 per day and a significant revenue stream. With the prospect of losing clients because of the outdated training, Bill developed and organized the Multimedia Development group (MDG) shortly after the downsizing.

Margaret was asked to manage the MDG and over the coming months assembled a good staff — people from inside the company who were familiar with the products, training, and clients for which they would be developing the new interactive learning tools. Margaret had worked with MSS for many years as a consultant within Customer Services. She was known as a knowledgeable consultant with whom clients enjoyed working. She initially worked with Bill to develop the proposal for the startup of the multimedia group within Customer Services.

Margaret assembled an outstanding group of instructional designers, multimedia programmers and graphic designers. After months of wrangling over hardware and software for developing the computer-based training (CBT), no decision had yet been made. Because of Margaret's inability to make tough decisions regarding software and equipment to use for development, Margaret was reassigned back to her consulting role within Customer Services. Over a year was spent in hiring the right people and determining the best hardware and software to use, but no interactive learning materials were being developed.

Bill determined that Multimedia Development needed a person who had previously developed interactive training and who could undertake developing CBTs for the new products being released immediately. Since none of the MSS development team had ever developed interactive training courses, outside expertise was needed — especially on the first project. Susan who worked for a local software reseller, had talked with Margaret and MSS about authoring software and also helping them develop their first CBT. Bill decided that Susan would be a good fit for leading the Multimedia Development group and hired her.

A few days before Susan was to start with MSS, Bill was moved laterally within the company to lead the development of other new projects. In November, when Susan arrived at MSS for her first day, her new boss was Robert not Bill. Robert had been with MSS for a few years and was widely considered one of the best consultants in the Customer Services group. He was well respected by the client companies for which he consulted. But Robert knew little about computer-based training or multimedia development. Robert had been given little time to learn about his new position and had not been briefed on the transformation of the training courses. He knew his charge was to continue the profitable bottom line for Customer Services.

Upon Susan's arrival, the multimedia group began developing a CBT for a soon-to-be-released software product. This CBT development was a three-to-four-month process. Upon successful completion of this first project, a marketing program disk was assigned to the group to be developed for another new product. The MDG had also begun developing an interactive presentation that Customer Services consultants, managers and salespeople could use to better sell their consulting services.

New projects were coming into the group, one CBT had been successfully developed and well received by the field salespeople and clients, and there were new CBT projects on the horizon to correlate with other new software releases.

At this same time, Customer Services was not showing a profit. Robert needed to make some changes in his organization to achieve his goal of profitability. Almost all of his trainers and consultants were billable to clients, but the Multimedia Development group was not billable. It was considered an overhead item for the Services group, and was thus expendable.

Six months after being hired, Robert came into Susan's office and told her that her group was being disbanded because it was generating too much overhead cost for Customer Services. In the ensuing days, some of the multimedia group left the company for new opportunities while others were reassigned to other CSS groups. Susan was assigned to Corporate Administration. She had one month to develop a proposal to find enough internal multimedia projects to fund her salary and overhead costs. Paying for projects meant other groups within MSS would have to transfer budget dollars to Corporate in order for the development projects to be completed. She was no longer a free option for MSS but now had to earn dollars to pay for her existence. She has a month to find the projects but only two days to determine whether she will accept the challenge and stay with the company.

1. If you were in Susan's position, what would you do?
2. Do you think it would be helpful to talk with Bill and Margaret?
3. What are Susan's legal options?
4. Should she pursue legal options at this time?
5. Should she begin looking for another position within or outside the company?
6. Was Susan mislead in taking a position with an unstable group and company?

Case Number 11

The Computer Shop

by Craig A. Agneberg, President, Blue Sky Interactive

Jim Steffen graduated from college with a computer science degree. His goal was to someday lead a group of professional programmers in the development of innovative computer solutions for business. His first job out of college was as a systems analyst for a large retail manufacturer. After a few years of increasingly greater responsibility, he accepted a job as a lead programmer/project manager for a small business software developer, Ortek, Inc.

While with Ortek, he joined a professional computer users' group and began networking with the other programmers in the group. One of the people he met, Joe Wallace, a contract programmer, called him one day and asked him if he would have some spare time to help finish a project Joe had begun a month or so ago. His delivery date for the project was nearing and he needed some help finishing the project on time. This was the beginning of Jim's consulting business. He began by accepting small development projects in his free time like this project with Joe. This connection, along with the other programmers he was getting to know through the users' group, was a springboard for Jim to begin his own business. Even though he was doing remarkably well with his side business, Jim was still reluctant, however, to give up the "perks" of his daytime job.

Ortek had produced one of the best-selling software development programs in the industry and it was successful beyond the company's wildest dreams. However, the company was not ready for such success and had a difficult time expanding to meet the demands of a best-selling software program. Due to the inability to meet the financial demands of expansion, Ortek made it known it was willing to be acquired. Ortek was purchased shortly thereafter by a larger software company. And as with most company purchases, a realignment of positions was inevitable. Unfortunately, immediately following the purchase, all members of Jim's group were given pink slips and asked to leave as soon as the decision was made. They had time to clean out their desks before being escorted out the front door.

As bitter and angry as Jim was at the time, the layoff was a blessing in disguise. He had wanted to start his own business and now he felt this was a sign to begin. He wanted to include two of his co-workers, Gerry Sanders and Sandra Callahan, with whom he had been working closely at Ortek. They, too, had expressed a desire to start their own businesses and both had been moonlighting as contract programmers. Over the next few weeks, the three began formulating plans for their business. The name they chose for their company was "The Computer Shop." But their company formulation activities took a back seat because their consulting was so time consuming that they had little time to deal with the makeup of the company. Gerry, with Jim's help, was able to land some consulting projects that would help pay their bills while they continued to formulate their business structure. Gerry found himself very successful in selling their new company's services to other firms. Within three months they had four ongoing projects and three other projects waiting in the wings.

The text of the first agreement was worded as follows:

AGREEMENT

This agreement between Gerry Sanders, Sandra Callahan and Jim Steffen, (hereafter referred to as Partners) on December 3, 1995, consists of the following terms:

Partners will operate as a business under the name of G.A. Sanders on a temporary basis until Partners have formed a new company. Within two months, it is Partners' intention to form a new company under the direction of the Partners.

All contracts signed heretofore will be under the name of G.A. Sanders and must be signed or initialed by each Partner.
All contracts signed during this interim period by the G.A. Sanders company (between the above date and the date of the new company formation) will be the property of all Partners.

It is understood that the G.A. Sanders company is being used solely as a means of signing contracts, collecting revenues from outstanding contracts and paying expenses. All monies collected as well as all expenses jointly incurred and approved by the Partners will be divided equally (1/3, 1/3, 1/3).

All active leads, active contracts, and outstanding proposals protracted during this interim period between the start-up of the company and the new company forming become the property of the new company when formed or in the event that the company isn't formed become the property of the Partners. These active leads, active contracts, and outstanding proposals will be divided equitably between the Partners if a new company is not formed.

Any monies and expenses remaining from the interim company will be transferred to the new company when formed.

Any Partner has the right to amend this agreement upon agreement of all other Partners.

Over these first months, the job duties/responsibilities were becoming more defined. Gerry was leading the sales and account management side of the business, minor programming work and the accounting/financial details. Sandra was leading the projects, interfacing with the clients, and spending her free time with the user interface design for the projects. Jim was leading the programming and completing most of the programming needed for the projects. As with any start-up company, they were working 14-16 hour days six to seven days a week. As successful as they were, they knew they needed help to meet the upcoming project deadlines. They decided to hire another programmer, Samantha.

During the past four months, each of the three partners had been paid approximately $1,000 each. Jim was uncomfortable with the lack of company structure though. A lot of money (about $60,000) was about to be paid to the company but the three partners had not developed a business plan or a partnership agreement. At this time, Gerry was handling all of the accounting and financial matters. He consulted with Sandra and Jim on financial concerns and details. What also worried Jim was that Gerry had no formal training in finance or accounting, yet he was entrusted with keeping track of the financial parts of the company. Jim talked with Sandra about his concerns and also expressed his desire to work out a partnership agreement among the three of them. Sandra agreed with Jim and they made plans to talk with Gerry on Tuesday after the long holiday weekend.

It was business as usual after the holiday — lots of work and mail to catch up on with deadlines that continued to loom in front of them. At the end of the day after Samantha had left, Gerry, Sandra and Jim sat down for their meeting. Gerry slid some papers across the table to Jim which included the following information:

AGREEMENT

This Agreement made this 8th day of April, 1996, between GERRY SANDERS ("Sanders"), SANDRA CALLAHAN ("Callahan"), and JIM STEFFEN ("Steffen").

WHEREAS, Sanders, Callahan and Steffen have operated as independent contractors under the name of "The Computer Shop" which is in the business of database development and interface design since November, 1995.

WHEREAS, Sanders and Callahan wish to terminate their business relationship with Steffen, and Steffen agrees to terminate his business relationship with Sanders and Callahan, it is agreed as follows:

Steffen will cease working with Sanders and Callahan in regard to the above-mentioned business on April 8, 1996.

Sanders and Callahan agree to pay Steffen the sum of $12,550.00 as full and complete settlement as to any fees, commissions, profits or other financial compensation owed or due Steffen in regard to the above-referenced business by Sanders and Callahan. This sum represents money owed or due Steffen from, but not limited to, the following contracts: XYZ Corporation, ABC Company, and BCA Limited.

Sanders and Callahan agree to pay Steffen $4,000.00 on April 8, 1996, and the balance of $8,550.00 on April 30, 1996, as full and complete settlement as to any funds of whatever nature due Steffen from Sanders and/or Callahan.

Steffen further agrees and understands that he was operating as an independent contractor during his work with Sanders and Callahan and was not an employee or partner of Sanders and Callahan.

Steffen further agrees to return his bank card and his phone card on April 8, 1996. Furthermore, Steffen, in consideration of the $12,550.00 being paid to him by Sanders and Callahan, releases any claims or rights he has in any personal property or intangible property of Sanders, Callahan or The Computer Shop. Sanders and Callahan agree to hold harmless Steffen for any debts or taxes owed by The Computer Shop.

This agreement embodies the entire understanding between the parties, and any and all prior correspondence, conversation or memorandum being merged herein and replaced hereby, and no change, alteration or modification hereof may be made except in writing signed by all parties hereto.

After Jim read the agreement, Gerry began telling Jim how inefficient Jim had been in completing his assignments, that clients were dissatisfied with his work, and that he didn't figure into the partnership any longer. They, in fact, had him pack his personal belongings and escorted him to his car.

1. What does Jim do when he leaves this meeting?
2. What can Jim do to legally protect himself?
3. Could Jim have protected himself legally from the beginning of the partnership?
4. How should Jim have handled the rest of the meeting?
5. What happened to Sandra's agreement to talk with Gerry?
6. How could something like this happen when the three of them had worked together so closely?
7. How would you feel at this point if you were Jim?
8. What steps should Jim take after being shown the door?
9. Should Jim allow Gerry and Sandra to pack his personal belongings and be escorted to his car?

Case Number 12

Legal, Ethical, or Morally Correct?

by Marilyn R. Chalupa, Assistant Professor, Ball State University

Rochelle is the technology supervisor at Software Experts, a small company noted for creating specialized software applications for nonprofit organizations. She oversees a department of six marketing specialists and eight programmers. The marketing specialists are assigned territories and work closely with their clients to keep them updated with the latest software improvements. In addition, the marketing specialists are continually seeking new clients. The programmers write the programs to meet the clients' specifications, train the marketing specialists, and debug any problems found.

The marketing specialists and the programmers meet every Monday morning and every Friday afternoon. At these meetings, the marketing specialists receive training for new or updated software versions and share with the programmers any problems their clients encounter with the software. The programmers are informed of the software needs of the clients as well as any problems encountered.

Rochelle's responsibilities include coordinating the schedules of these employees and directing the Monday and Friday meetings. One morning as she was working at her desk preparing for the meeting, she accidentally overhead Audrey, one of the marketing specialists, and Wesley, one of the programmers, talking about their church having a need for a database. A committee was being formed at the church to determine the database needs and to search for a program that met the needs.

Rochelle could not clearly hear all of the conversation, but she heard Wesley suggesting to modify a company program and to offer it to the church at a very cheap price to save the church money. Audrey agreed it would save money but she did not know if the solution suggested by Wesley was ethical, legal, or morally right. Audrey and Wesley continued to discuss what was ethical, legal, or morally right. Rochelle could not believe she had heard two of her best employees debating what was legal, ethical, or morally right. Nor could she believe that Wesley would think of modifying a company program and selling it cheap without company authorization or permission. Wasn't that stealing from the company?

1. Discuss the definitions of legal, ethical, and morally right.
2. Is it right for Wesley to do what he is suggesting? What would motivate such an action?
3. Brainstorm what actions Rochelle could take and what the implications would be for each action.
4. Should Rochelle talk to her immediate supervisor? What should she say if she did decides to talk to her supervisor?
5. Would a company policy help Rochelle in determining what to do? If so, what should the policy say?
6. What would you do if you were Audrey? Explain what would motivate your actions.

Case Number 13

The Case Of The Sometimes Lazy Listener

by James Calvert Scott, Department of Business Information Systems and Education, Utah State University

Tommy Chan, 34, owns a small insurance agency in Strongberg. He is an independent agent who sells policies from different companies. Because his work takes him out of the office frequently, he has a secretary, Martha Black. He relies heavily on Martha to assist him. Martha, 63, is an outgoing, independent widow, who has worked for him since he bought the agency two years ago.

Martha mixes well with others. She enjoys her job since it gives her opportunities to interact with the public. Martha has lived her entire life in Strongberg. As a result, she knows many of the residents of the town and surrounding areas. Martha's life is centered around people. She has a tendency to be more than casually interested in other people's business.

"Sorry to hear about your accident, Jessie. Yes, my computer screen tells me that you are covered. Your deductible is $250; in other words, you pay the first $250," Martha explained. "Is there anything else I can do for you?"

"Not really—relating to the accident, that is," replied Jessie Chambers. "But I'm curious, do you know how much the John Smalls got for their house? The small one on Beech Street, not the big one on Peach Street. I'm just dying to know. I've got a lunch riding on it. When Sally told me she heard from her neighbor that it sold for $112,500, I told her she's wrong. There's no way that ity bity house could bring more than $95,000. If my price is closer than Sally's price, she has to treat me to lunch. Isn't that great, Martha? Guess who's going to win this one?" teased Mrs. Chambers.

"Jessie, I'm sure you'll win this one. Maybe I can help out. I'll call Maybelle and see if she can find out. It's so useful to have a friend who works at the county court house. She's in a position to get the details on lots of things. That's the selling price of the John Small house on Beech Street, right?" Martha reconfirmed as she wrote herself a note.

"Yes, that's right. Did you know that Fred and Nellie are about to file for divorce?" Jessie continued.

"Really, Fred and Nellie filing for divorce soon. You don't say? Can you please hold?" she abruptly said.

Martha's attention shifted to Mr. Chan as he walked out of his private office toward the front office door. "Mr. Chan, is there something I can do to assist while you're away?" she inquired.

"Yes, there is, Mrs. Black. Please pull the Nora Scott, James Watt, and Jane Knott files and put them on my desk in the center. Also, telephone Jon Reinhardt. Change our meeting date from next Friday to next Thursday and the time from 10:30 to 9:30. You're sure that you got that, Mrs. Black?"

"I'm absolutely sure, Mr. Chan," replied Mrs. Black confidently. "You know my memory; I never miss a beat or a bit. It's as good as done," she quipped.

As Mr. Chan closed the front door, Martha's attention refocused on her interrupted conversation with her friend Jessie. "Are you still there, Jessie? Sorry for the delay, but Mr. Chan walked by. He wants me to do some things, so I can't talk for too long now. You were saying something about Fred and Nellie's probable divorce. Do you suppose there's some hanky panky going on? I saw Fred sitting very close to Kathleen Rich a few weeks ago at The Hideaway. They both looked embarrassed when they saw me."

"Really? Do you suppose they were up to something?" Mrs. Chambers asked.

"Perhaps they were, perhaps they weren't," Martha teased. "But I'll find out. Say, I better let you go for now. I want to call the court house before Maybelle goes for lunch. When I have a tidbit, I'll call you. Bye, now!"

Martha dialed Maybelle's number, but her line was busy. So she decided to remove the files that Mr. Chan wanted from the drawers. She mumbled to herself, "Pull the Scott—pull the Scott—pull the—Mott, and the—Pott files. I knew I could

remember all three." Opening various drawers, she removed the Jane Scott and James Mott files. After going through the P section twice, she still couldn't find the Pott file. "Where on earth is that Pott file, I wonder?" she asked herself aloud. "It's got to be around here someplace." With two files under her left arm, she walked into Mr. Chan's office. She placed the files in his in basket just like she always did. When she returned to her desk, she again tried the court house number. It was still busy, so she tried Jon Reinhardt's number. He answered, and Mrs. Black changed Mr. Chan's appointment to the following Friday at 9:30 a.m.

Just before one o'clock Mr. Chan walked into the office. Since Mrs. Black was talking on the telephone, he went straight to his private office. Less than a minute later, he was standing at Mrs. Black's desk as she concluded the telephone call. He looked perturbed.

"Mrs. Black, where are the three files I asked you to put in the center of my desk? I distinctly remember telling you to put them there, and you said you would. I can't find them, and I need them now."

"Did you look in your in basket?" asked Mrs. Black. "I always put the files you want there."

"But I told you to put them in the center of my desk. My instructions were clear, I believe," he countered. Having made his point, Mr. Chan returned to his office, only to quickly return to Mrs. Black's desk. Holding up two files, Mr. Chan stated, "These are not the files I requested, Mrs. Black. I need the Nora Scott, James Watt, and Jane Knott files. And I need them now. Do you hear me, Mrs. Black?" said an annoyed Mr. Chan.

"I hear you just fine, Mr. Chan. I've got better hearing than most people my age," a defensive Mrs. Black replied.
"I'm sorry. I didn't mean to hurt your feelings, but it is frustrating when people don't listen," he said in an apologetic tone.

Quickly Mrs. Black retrieved the correct files and handed them to Mr. Chan. He turned away and returned to his office, closing the door behind him.

There was dead silence in the office for the next hour as the two sulked privately. Then the telephone in Mr. Chan's private office rang, disturbing the quiet. Three minutes later Mr. Chan emerged from his office. There was a grimace on his red face. His fists were clenched. He walked deliberately to Mrs. Black's desk.

"We need to talk, Mrs. Black. That was Mr. Reinhardt calling. He wanted to change our meeting time again. He said that you telephoned him this morning and changed our meeting time to next Friday at 9:30 a.m. I'm certain I said that I wanted you to change our appointment from Friday at 10:30 to Thursday at 9:30. Is old age suddenly creeping up on you, Mrs. Black? Are you feeling okay?"

"Yes, I'm feeling fine, Mr. Chan," stated an embarrassed Mrs. Black. "I'm sorry. I guess I didn't hear what you said very well. I don't usually foul up so many things in one day. Maybe I should get my hearing tested after all. Jessie Chambers has a new hearing aid; it helps her a lot. She doesn't miss a bit of gossip now."

"Mrs. Black, a hearing aid may not solve your problem. There is a big difference between hearing and listening, you know," Mr. Chan reminded her.

"Oh, there is, isn't there?" an amazed Mrs. Black responded. "Thanks for pointing it out."

"You are quite welcome, Mrs. Black. That is what friends are for."

1. What evidence in the case supports the position that Mrs. Black is a good listener?
2. What evidence in the case supports the position that Mrs. Black is not a good listener? Support your position.
3. Do you think advancing age and hearing loss are major factors in Mrs. Black's listening problem? Why or why not?
4. How do you evaluate the way in which Mr. Chan dealt with Mrs. Black's listening problem? What actions could Mr. Chan take to encourage Mrs. Black to listen?
5. What might happen to Mrs. Black if Mr. Chan were not so kind or understanding?
6. What is the difference between hearing and listening, and why is this difference so important?
7. What might Mrs. Black do to improve her listening skills at work?
8. How do your own listening skills compare and contrast with those of Mrs. Black?

Case Number 14

The Case Of The Questionable Writing

by James Calvert Scott, Department of Business Information Systems and Education, Utah State University

"Yes, sir. I will do a more careful job in the future, sir. I apologize for the problem I've created, sir. My writing in English is not as good as I'd like it to be. Wording and spelling are harder for me in English than in Japanese. Please forgive me," a humiliated Sandy Watanabe replied to her supervisor.

"Don't take it too hard, kiddo. We all make mistakes," responded Mr. Denver. "I know you are trying to make a good first impression. It's hard during the first few weeks of a new job."

Sandy Watanabe, a third-generation Japanese-American, grew up on the Big Island of Hawaii. Because the family often shipped its flowers to Japan, it maintained close ties to the homeland. Consequently, every member of her family was fluent in Japanese. In fact, they either traveled to Japan or hosted Japanese relatives at home every year.

In many ways the Watanabes are not a typical American family. At home they speak primarily Japanese; at work, a mixture of English and Japanese. They follow events in Japan more closely than those on the mainland. In many ways their family and business life is more Japanese than American. Sandy's father rules over the business, and her mother rules over the home. Her two brothers are second and third in command within the thriving flower business. Although Sandy earned a four-year degree in Hawaii, her options are very limited in the family business. Her father told her that it was not proper for her to be anything but a secretary. "Young women," he said, "should work in low-level positions only until they marry. Then they should stay home and support their husbands just like your mother has done. That way men can be economic animals, tigers. That is the traditional Japanese way."

Torn between her family's Japanese way of life and that of her American friends, Sandy was frustrated. The more she thought about it, the more she knew that she wanted out. She wanted out of the family business and out of Hawaii. Both were confining her and limiting her future.

A few months later Sandy decided to go her own way. She bid a tearful goodbye to her family and departed for Washington, D.C. She looked forward with anticipation to a fulfilling job in the office of the Secretary of State. There she would be an administrative assistant to the undersecretary who dealt with Asian matters. She would have opportunities to use her Japanese language skills regularly. She thought it would be an ideal job.

Sandy soon found that working in the capital city was challenging. Work had to be completed quickly and accurately. The rules and regulations were strictly enforced. There was little room for error when international relationships were at stake. The work environment was hectic. It definitely was not the laid-back life she knew from her days in Hawaii. She knew that she either had to meet the standards or she was out. It was that simple.

"Did y'all see the letter that new person, the one from Hawaii, dictated?" drawled the inexperienced stenographer. "I nearly died when she gave it to me. I've never heard a letter like this one before." She picked up her transcribed copy and began reading aloud to the head of the secretarial pool: "Now that the leaves are turning colors and the mists are again upon the hills . . . Isn't that a weird way to start a letter? With kooks writing letters like this one, it's no wonder relationships with Japan are so bad. Down home we start our letters much differently. We get to the point—none of this mists and leaves stuff."

"Let me read it for myself, please," the experienced stenographer said. "I've seen a lot of strange letters working here, especially the ones that go abroad. Most of them aren't much like the ones in this country."

As the head of the secretarial pool slowly read the draft, the inexperienced secretary looked on. She watched for any clues that her boss was concerned about the letter. Three minutes later the head stenographer looked up.

"Don't you find this letter real strange? It's so vague—just mumbo jumbo. I don't see the point of it. Who cares about the trees and the weather? Let's get down to business. That's what we're here for. We aren't here to write that creative stuff. What are y'all going to do about it?"

"First of all, Carolyn, let me give you a few tips. It is your job to record and transcribe letters with no errors. If the dictator makes an error, you correct it. You make him or her look good. You've misspelled two words in the first paragraph—you've left the s off of leaves and transposed the i and e in receiving. And that's just the first paragraph. You didn't remember to type Japan in all caps in the inside address either. Before you criticize the work of others too much, you need to have your own house in order. If it will make you feel better, I'll show the letter to the section chief—after you correct all errors, that is. Is that a fair deal, Carolyn?"

"Yes, ma'am," the young stenographer replied. "I know I should have concentrated on my part of the work. But my heart is in the right place. I'm also concerned about the quality of the message being sent. In this case, I think the message stinks. It makes little sense. I think it's way out of line, don't you?"

"We'll see. I'll show it to Mr. Denver after you correct it. Be sure that you proofread it very carefully this time, please," the chief stenographer cautioned. "Department work must be error free, Carolyn."

"Yes, ma'am," Carolyn replied.

The next morning the head stenographer saw Carolyn in the staff lounge. She invited Carolyn to drink her cup of coffee at the table in the far corner of the room. Their conversation would be private there.

As they both seated themselves, Carolyn said, "I'll bet you're about to tell me that I was right about that weird letter I transcribed yesterday."

Setting her cup down, the head stenographer looked up at Carolyn and smiled. "Well—not exactly. I spoke to Mr. Denver this morning when he came in to work. I showed him the corrected letter that Miss Watanabe dictated. He says that the content is fine."

"You're putting me on, aren't you?" quizzed Carolyn. "You're playing a joke on me!"

"Carolyn, I'm afraid the joke is on you. The message of the letter is culturally correct for a Japanese recipient. He or she would be offended by the typical direct, confrontational American message. Mr. Denver says that the Japanese communicate much differently than we Americans do. They communicate very indirectly and implicitly. They depend much less on words than we do for meaning. Much of their meaning comes from stored information or context. That information is built up over time as the relationship develops. It reduces the reliance on words to communicate ideas. It's a little bit like your ability to understand what your best friend is trying to say. In many cases you don't need a lot of words to get the message. You know enough about the person that you can fill in the missing parts with considerable accuracy."
Stunned, Carolyn replied, "Wow! I never thought about it that way. I—I guess it makes sense. I only looked at it the American way."

1. In what ways was Sandy Watanabe's background unusual for an American citizen?
2. How did Sandy Watanabe's life in Hawaii prepare her for her job in Washington, D.C.?
3. Was Carolyn overstepping her role at work when she questioned the content of one of Sandy Watanabe's letters? Why or why not?
4. Why do you think that Carolyn misinterpreted Sandy Watanabe's letter?
5. How effectively do you think the head stenographer dealt with the questionable letter?
6. Under what circumstances, if any, should American citizens create letters with unusual messages?
7. If Carolyn wants to learn more about writing in a culturally sensitive manner, what would you advise her to do?

Case Number 15

The Korean HRD Connection

by Gary N. McLean, University of Minnesota, St. Paul

Dr. Ron Johnson, professor of Human Resource Development (HRD) at the University of the West Coast (UWC) in California, has had an independent consulting business in human resource development for almost 30 years, during the time he taught at UWC. Many of his graduate students who were from Korea have returned home and are employed in the human resource development field. As a result of these connections and his own personal interest in international HRD, and specifically Korea, he has visited Korea on a number of occasions. He believes that he understands the business environment and something about the culture of the Korean people.

As a result of his relationship with a former doctoral student, Dr. Lee, who is working in Korea with a major international human resources consulting firm, one of the major conglomerates in Korea contracted with Dr. Johnson to deliver a one-week workshop in the United States on Human Resource Development. The workshop consisted of the following units: Overview of HRD, Training and Development, Organization Development, Trends and Issues in HRD, Quality Management, International HRD, Career Development, and Strategic Planning in HRD. The workshop also included a couple of field trips to the HRD departments of local companies and a number of social activities. In addition, Dr. Johnson attended the international conference of the American Society for Training and Development with the workshop participants and met with the participants every night to debrief the activities of that day. The evaluative feedback was very positive, and the intent was to continue the relationship in the future.

Three months later, out of the blue, Dr. Johnson received a fax from the Deputy Manager of the Planning and Development Team, Human Resource Development Institute, from a different major conglomerate in Korea without any indication of how he had learned about Dr. Johnson. The assumption made by Dr. Johnson was that there had been some sharing that had occurred from the workshop participants from earlier that summer or from Dr. Lee.

The actual letter, without changes in Korean-English, read as follows:

Re: Request for Human Resource Development (HRD) Specialist Training Program

I'm very happy to have a chance to know you. I'm in charge of Planning & Development Team of Human Resources Development Institute (HRDI) in one of the largest business conglomerates in Korea.

We have been planning the overseas training program. This is to ask you to offer us a good training program to enhance our specialties. Therefore first, I'd like to know "Instructional Systems Design & Development" programs and "Organizational Development" programs you offer.

Second, Whether you can establish a tailored program for our needs with in-depth study available in the following areas.

* Training & Human Resource Development
* General Instructional Development, 1 week
* Advanced Instructional Systems Design & Development, 4 weeks
* Organizational Behavior, 1 week
* Organizational Development, 4 weeks

Our study group consists of 20 participants. The training in the U.S.A. is only a part of a whole 1 year training program. They are going to complete a 1 semester at the Korea University. After the training in the U.S.A. they will take another semester. The plan I'd like to propose is as follows.

* Period: 10 weeks
* Class size: 10 people (each time)
* Schedule: 2 times a year (1st: JAN-FEB, 1997, 2nd, JUL-AUG 1997)
* Contents: as above

Please let me know the detail information: Schedule, Budget, Housing, etc. I'm looking forward to hearing you from soon.

Dr. Johnson was overwhelmed by the request. First, there were a number of questions that immediately popped into his head that he believed had not been fully answered in the letter. He would need to know the answers to those questions before he could adequately respond to the question. Second, given his existing commitments to UWC and his current clients, he wondered how he could respond to two such lengthy workshops. He was conflicted, however, as he was very interested in expanding his international experiences and, particularly, in growing his consulting business in Korea.

He knew that there were others in HRD consulting businesses who could support the offering of the workshops and there were many well-respected institutions of higher education around the country who could also cooperate in offering a good experience. And he was concerned about managing such a large project, and he was concerned that others who were potential partners might want to take over major parts of the project.

Dr. Johnson was also aware that HRD, as a field, was relatively new in Korea. As a result, the level of knowledge and understanding about HRD varied among Korean HRD professionals. Likewise, English language skill also varied widely, from fluency to an inability to communicate in English at all. Both of these factors could also impact major components of the workshop.

From his earlier experience, Dr. Johnson also knew how difficult it would be to negotiate the workshop from a distance. Differences in time, language differences, cultural norms and expectations, and a lack of personal connections all contributed to difficulties in communications and reaching agreements mutually understood by the parties involved.

Thus, Dr. Johnson was faced with several dilemmas that he would have to answer. If you were Dr. Johnson:

1. What additional information would you like to obtain from the Korean company before responding with a specific proposal?
2. What problems will you have to overcome in developing the proposal?
3. What are some ways you could overcome the potential problems identified in question 2?
4. What are some components that you would include in the workshop proposal, given the information that is currently available to you?
5. How might the proposed workshop differ from a similar workshop that you would design for a group of U.S. HRD professionals?

Case Number 16

But It Was Only a Little Lie . . .

By Janice K. Barton, Associate Professor, University of Nebraska at Kearney

Amy has wanted to work in an office ever since her first keyboarding class in junior high school. Her high school business classes just reinforced her desire to find a job in the business world. During her senior year, Amy applies to Arapahoe Community College and is accepted for the fall term. She selects office technology as her major because she loves to work with computers.

Amy excels in her college computer and technology classes and easily masters word processing, database, spreadsheet, and presentation software programs. She does not excel, however, in her writing classes. Although Amy's college business teachers stress the importance of developing good writing skills, Amy does not work very hard in her business English and business communications classes. With all the technology that's available, she is sure that in the "real" business world, letter writing is a thing of the past.

After graduation, Amy moves to the state capital and begins looking for a secretarial position. One of her first interviews is with a large manufacturing company. The interviewer tells Amy that this position requires a computer background and strong writing skills. When asked about her writing skills, she replies that she had completed business English and business communications classes in college and is a good writer. She really wants this job. After all, how much writing can there actually be? She has no doubt in her mind that she can write well if she really tries.

Amy is hired for the position and begins working for Logan Ames, the sales manager. She is amazed at the number of letters and memos Mr. Ames writes each week. At first, her primary responsibility is simply to key Mr. Ames' correspondence. Then Mr. Ames begins asking Amy to compose replies to routine letters. Amy searches the department's files and finds letters written by her predecessor that she can basically copy, changing words as needed.

One morning Mr. Ames asks Amy to compose several letters that contain "non-routine" information. She cannot find letters in the file that she can copy, so she writes what she thinks are adequate letters and gives them to Mr. Ames for his signature.

Later in the morning, Mr. Ames stops by Amy's desk and hands her the letters. With apprehension, she notices the many comments scribbled on them. "Amy," he says sternly, "these letters can't be mailed the way they are written. I've made some changes. Please re-key them as soon as you can. I'd also like to chat with you after lunch for a few minutes."

Tearfully, Amy starts re-keying. She had misrepresented her writing skills during the interview and now Mr. Ames knows that she can't write. Is he going to fire her? She loves everything about her job, except the writing of course. She thinks she can probably learn to write well if Mr. Ames will only give her another chance but will he?

1. Was Amy wrong in misrepresenting her qualifications even though she truthfully thought she would be able to correct her writing deficiencies?
2. How could the Human Resources Department have more thoroughly checked Amy's qualifications?
3. Can Amy legally be fired because she misrepresented her qualifications during the interview and lacks the writing skills needed for the job?
4. If given a second chance, what can Amy do to improve her writing skills?
5. Was Amy correct in assuming that technology is eliminating the need for good business writing skills?

Case Number 17

I Know I'm Right

by Janice K. Barton, Associate Professor, University of Nebraska at Kearney

Susan is excited as she dresses for work. Today is her first day on the job at the state department of travel and tourism. She has just graduated from college and is a little overwhelmed at her good fortune in finding "the job of her dreams." Susan loves to travel and is happy she will have the opportunity to promote her state to travelers from all over the world.

Susan spends the first two days in an orientation program for new state employees. On Wednesday, she reports to the department and is introduced to Mike, the office manager. Mike is a friendly, outgoing person who has been the office manager for ten years. He makes Susan feel welcome and tells her how happy he is with her qualifications. Many of the employees have been with the department for years, and he hopes that Susan will be able to share some fresh ideas with all of them. Mike stresses that he maintains an open door policy and tells her to be sure to talk with him if she has any concerns.

At the end of the week, Mike asks Susan to spend several hours looking through the files to learn more about the functions of the department. In reading through the correspondence, Susan is appalled by what she finds. Many letters do not follow the principles of good writing that she learned in her college business communications class. These letters are filled with outdated expressions, clichés, wordiness, and rambling sentences. The punctuation is atrocious, and some letters contain misspellings. She remembers illustrations of poorly written letters in her business communications textbook and poor writing examples that her teacher had shown the class. She'd like to send some of these letters to her communications teacher, Dr. Anderson!

"Well," thought Susan, "some of these people certainly don't know how to write. I'm sure these letters are not forming a good impression of the department or the state. I'd better talk with Mike about what I've found."

Susan approaches Mike and, pulling no punches, expresses her opinion of the quality of the letters she has been reading and names those persons she considers to be poor writers. To her surprise, Mike becomes defensive and interrupts her with "Susan, you've been with us for less than a week. I don't think you're in a position to judge whether our writing is good or bad." After a few more pointed comments by Mike, Susan retreats to her desk totally flabbergasted.

On the following Monday, Gloria, a co-worker, stops at Susan's desk and says "I hear you don't like the way some of us write our letters. That's the trouble with young college grads; you think you know everything." Gloria walks away before Susan can reply.

From that day on Susan feels isolated. Her co-workers avoid her or when that isn't possible, treat her coolly. She considers resigning but after much deliberation becomes determined to turn the situation around. "I may be young and inexperienced," she thinks, "but I know I'm right. I just have to find the right approach . . ."

1. How long should Susan have waited before sharing her perceptions of the quality of letters being sent from the department? Why?
2. Did Susan use the right approach when she brought this matter up with Mike? If not, what approach would you suggest?
3. Should Susan have "named names"? Why or why not?
4. After telling Susan (a) he was happy with her qualifications, (b) he hoped she would bring fresh ideas to the department, and (c) she should talk with him about her concerns, why did Mike react as he did?
5. Should Mike have shared Susan's comments with other staff members? Why or why not?
6. If Susan pursues the matter, do you think her job is in danger? Provide reasons why you answered as you did.
7. If you were Susan, what would you do to mend fences but still work toward improving the quality of letters being sent to promote the state to travelers throughout the world?

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Case Number 18

Don't Put All Your Eggs in One Basket

by Janice K. Barton, Associate Professor, University of Nebraska at Kearney

Sarah is the computer network manager at Oak Ridge Community College. She has held this position for two years and hopes to eventually find similar employment in private business or industry. This is Sarah's first management position, she graduated from Oak Ridge four years ago.

The American Management Association, a national professional business organization, is holding a regional technology conference, which will be attended by representatives from business and industry throughout a ten-state area. The conference is being held at a hotel in Mason City located 200 miles from Oak Ridge.

Sarah has been asked to give a presentation at the conference on networking and network management. She readily agrees to participate, seeing it as an opportunity to establish contacts with many business representatives who will be attending. These contacts could prove invaluable in helping her find a networking position in the private sector.

Sarah uses PowerPoint to prepare her presentation. She decides not to write a speech but to speak spontaneously as she shows her PowerPoint slides. Sarah will take a laptop computer to the conference and use an LCD panel to project the images onto a large projection screen.

Sarah's session is scheduled from 1:30-2:15 on the first day of the conference. She arrives at 1:20 to set up her equipment. To her horror, she finds that she cannot boot the PowerPoint program on her laptop computer. The session moderator and several persons from the audience attempt to help her. Nothing works. As the room fills, Sarah is in a panic. Why hadn't she made transparencies as a backup? How will she remember everything she was going to cover? In her flustered state of mind, she can barely remember her own name! The session, however, cannot be canceled. The show must go on.

Now Sarah is seated on the dais waiting to be introduced. She looks out over a sea of 200 faces. Her hands are trembling and her knees feel weak. She would give anything to be somewhere else!

The introduction is completed, and Sarah walks to the lectern. She takes a deep breath and makes a weak joke about being an expert in networking but not being able to run a laptop computer—a smattering of laughter ripples through the audience. She is glued to the lectern; her heart is racing; she has no notes to refer to and her mind goes blank.

Stark fear starts the adrenaline flowing and her brain suddenly engages. She talks rapidly, jumping randomly from topic to topic. She peppers her talk with networking terminology and concepts that only an expert would know. Sarah is aware of puzzled looks on the faces of persons seated in the front row, but she forges ahead. The more nervous she becomes, the faster she talks. The audience becomes restless. Many people walk out of the room. The door squeaks each time it is opened and voices spill in from the hallway. Those audience members who are still trying to listen lose their concentration with each squeak of the door.

After what seems like hours, Sarah glances at her watch. She has been talking for only 20 minutes, but she has nothing more to say. She asks if the audience has questions. There are none.

The moderator thanks Sarah, and the audience gives her lukewarm applause—most people are already on their way out the door. Sarah wants to fade into the woodwork. How could things have gone so wrong?

1. Should Sarah have "put all her eggs in one basket" by relying entirely on her PowerPoint presentation without preparing an alternative in case of computer problems? Explain the rationale for your response.
2. Is there anything Sarah or the session moderator could have done to salvage her presentation? If so, what actions could Sarah have taken? What actions could the session moderator have taken?
3. If you were Sarah, how would you have prepared for this presentation?
4. Do you think Sarah ruined her chances to be considered for employment by any company representative who attended her session? Why or why not?
5. What actions might Sarah take to salvage her credibility after the presentation?

Case Number 19

E-Mail Training Or Sabotage

by Janice Schoen Henry, Associate Professor and Chair, Department of Information Management Systems, College of Applied Sciences and Arts, Southern Illinois University, Carbondale

Priscilla is the computer network administrator for a brokerage firm located in a small city. Five years ago she started with the firm as a clerk during a high school internship program. Later, while still in high school, she did filing and some receptionist work as needed. Upon graduation from high school, she was asked to join the firm as a Junior Secretary. She is intelligent and learns fast, but is somewhat shy and low-keyed in her conversations with other people.

However, because Priscilla is ambitious, she started taking some computer-related courses at the local community college. She has gradually become well versed in a variety of the software applications that compliment the firm's computer system. Recently, she has been asked by her supervisor to assume new responsibilities under the new job title of Network Administrator. One reason behind this promotion is that the firm's brokers, each having a computer terminal on his or her desk, are having problems learning to use the e-mail system. The manager believes that the use of e-mail will increase the brokers' level of work output.

Priscilla has completed a training program with the company that installed the networking system. She also has a system mentor, Jerry, who serves as a troubleshooter when problems arise with the system. Priscilla's role is to train the brokers in the use of the network, with a priority on the use of the e-mail application, as well as to oversee the operation of the network. Any problems the brokers have with their networks should be reported to Priscilla first, who will either correct the problem or pass it on to Jerry. In her training Priscilla received only one set of materials, and they are focused more on the design and maintenance of the system than on its operation and training of users. She is trying to write out instructions for using the e-mail system, even though she is not yet aware of all the different types of problems that could arise. As of yet, the instructions have not been completed.

Priscilla has always had a good working relationship with the firm's brokers. They treat her with respect, and in the past they have encouraged her to develop new skills, especially those which could be used to help them operate their computers. They want to spend their time and energies working with customers, not figuring out how the network operates. Now that she has become responsible for the use of the e-mail system; however, the relationship is starting to erode. The e-mail system is a good one that will save them time in the long run, but it is somewhat difficult to master.

One broker in particular, Ms. Green, has given Priscilla most of her problems with the use of the e-mail system. Ms. Green had been with the company for 25 years and had been suspicious of each new technological change. Getting her to use the computer had been a major accomplishment.

Not too long after the network was installed, an electrical storm severely damaged the lines. Messages were lost, and the system was out of order until Jerry was able to get it repaired, first having to service some larger customers. Several of the brokers blamed Priscilla for the delay, telling her that if she was more assertive, Jerry would have made the repairs sooner. Because she had been working with Jerry for several months, she knew that he was doing the best that he could. Of course, Ms. Green took this opportunity to make her displeasure known, to the other brokers, to Priscilla, and then to the office manager, Mrs. Clout.

Once again, as she had done with the original installation, Priscilla visited each broker and reviewed the operation of their e-mail systems. Invariably, Ms. Green keeps on having problems with her e-mail, such as forgetting to use her current password or not sending her message after composing it, or trying to send external e-mail by using the internal e-mail procedure. Each time a problem develops, Ms. Green directs a tirade at Priscilla.

"An important customer has been saying that I don't respond to his messages. He wanted to sell some stock and lost money when the market changed. Are you certain that you told me the correct way to pick up my messages?"

Priscilla responded, "Yes I did, Ms. Green. Did you go to your message bar and call up each message that was flagged?"

"Of course I did. I'm not an idiot!"

"Would you like for me to explain the procedures again to be sure that you're following the correct sequence?"

"I suppose so, but don't take up all my time. And this time, do it right!"

Priscilla repeated everything that she had already told Ms. Green, and for a few days all was well. The next Monday, however, Priscilla learned that Ms. Green was once again having problems and had called Jerry to come to the office and fix her system.

"My e-mail is ineffective. Either the program is no good, or the incompetent person we have in charge doesn't know what she is doing."

Jerry made the trip to the brokerage, at cost to the firm. He soon learned the problem was with Ms. Green not following directions. He let Priscilla know that the problem was something she should have taken care of.

"It's too bad the firm will have to pay for a service call for such a simple problem. Have you figured out a way yet to deal with "Ms. Mean and Green?"

"Shhh!." Priscilla was afraid that Jerry's voice would carry into the other offices. "No, I haven't. Do you have any suggestions?"

"No way! That's your problem. I've taken care of my responsibilities, and I'm not going to start dealing with personnel problems. Good luck! You'll need it!"

So far Priscilla has not discussed her problems with the office manager, Mrs. Clout. Priscilla wants to try to handle the situation by herself.

1. Why might Ms. Green be so resistant to change that she refuses to listen carefully to directions?
2. Is there some other way that Priscilla could offer training to the brokers? If so, how?
3. What steps should Priscilla take to correct the situation?
4. Should Priscilla meet with Mrs. Clout, and, if so, what should she discuss?
5. What should Priscilla have said to Jerry about Ms. Green?
6. What strategies would you recommend that Priscilla use to work with Ms. Green?

Case Number 20

The Promotion

by Janice Schoen Henry, Associate Professor and Chair, Department of Information Management Systems, College of Applied Sciences and Arts, Southern Illinois University, Carbondale

Judy Barrett is a quiet, studious young woman who was left without a family at the age of sixteen. Her parents left her enough money to live on while she completed high school, with barely enough additional that she could go to a couple of years of college. Although Judy made decent grades in high school, they were not high enough to earn her any scholarships for college. She did not want to go into debt, but rather decided to take a program which would give her the skills needed to go to work.

Judy completed her two-year community college degree in Office Systems Management and went to work as one of fourteen office assistants in the headquarters office of the ABC Manufacturing Company. She appreciated being able to land a regular day-time job because she wanted to go to night school and complete a bachelor's degree in Business Management. Also, the job at ABC was better than average, paid well and provided a lot of employee stability.

Almost from the first week of work, however, her supervisor, Mary, recognized Judy's good skills and commitment to the job and began giving her extra responsibilities and work. Judy was proud to have been selected for the recognition but because of the extra work load, which often kept her working late, she found less and less time in the evenings to take classes. Although her pay kept increasing along with the extra work load until she had reached the maximum level for her position, she was somewhat frustrated that her educational goals were not being met. She kept hoping that she could carve out some extra time for her personal development, especially since a future in management looked good at ABC.

Two years after Judy had started to work at ABC, Mary was made Central Office Manager. Mary called Judy into her office and told her that she planned to recommend that Judy be promoted to fill her former supervisory position, even though there were two other secretaries with seniority over Judy who had expressed an interest in being considered for the promotion. Both of these secretaries produced satisfactory work, but neither had demonstrated the commitment to the job nor the personal ambition desired by the company in its management personnel. Mary told her that it was obvious that Judy would develop into a good manager, and now was the time to start that process, even though there might be some resentment on the part of some of the other office assistants.

From Judy's viewpoint, the possibility of resistance by her fellow workers created a special problem. She had always been a quiet person, almost shy, and preferred to focus on her own work while at ABC. Although she had a grasp of all the job responsibilities that would come under her supervision and had performed most of them, she had not communicated much with the other workers, nor had she spent much time with them socially. Mary had always been an open and sharing person who spent a lot of time interacting with the staff, and they all thought highly of her because she didn't act like the "other big wheels around the office." Judy had concerns about how she could fill Mary's shoes in this respect.

Judy met with Mary to discuss her concern about communicating and being effective in supervising the other workers. Mary reviewed Judy's many good skills and said that she felt that Judy would quickly develop the other skills needed to be a good supervisor. Judy, on the other hand, expressed uncertainty about getting along with the other workers, especially those who wanted the promotion and who would probably resent a newer employee getting the nod. Judy mentioned that she had hoped to get more training in effective communications and interpersonal relations skills as part of her bachelor's program but hadn't had time to take any of the courses which would have helped her in these areas.

Mary asked Judy if she really wanted the supervisory job. Judy responded that the job fit right in with her plans for her career, especially since it would open the opportunity to enter the company's training program offered to lower-level managers as well as mesh with her bachelor's program. It is just that the opportunity came so unexpectedly, and she wasn't sure that she would be able to take over the job without experiencing some problems.

Mary then said that she had an idea how Judy could get better prepared to take over the job. Because the work in the office was flowing smoothly, she would hold the position open for two weeks before she announced the new supervisor. In that two-week period Judy could study strategies and practice how she would develop her supervisory relationships with the other workers.

"In addition, I want you to prepare a ten-minute presentation to give to me and the other managers at the end of the two-week period, before we make a final decision about your promotion." Mary said. "You can discuss any work-related topic, but the idea is to demonstrate that you can communicate effectively and are ready to take on the higher-level responsibilities. I'll help you with the preparation in any way that you want, and I'm sure that the other managers will be extra supportive in receiving your presentation. Now frankly, Judy, there is another choice. You can decide any time during the two weeks that you don't want to be considered for promotion, and we'll promote one of the other workers. What do you think about this offer?"

1. What were Judy's expectations regarding her job?
2. Why were Judy's co-workers apt to resent her promotion?
3. What characteristics of Judy's personality helped her excel in her office assistant job. Explain.
4. What characteristics of Judy's personality would affect her ability to supervise. Explain.
5. Judy wished she could be like Mary when it came to interacting with other workers. How realistic is this?
6. Putting your self in Judy's place, in what ways could the new job support your career plans?
7. If you were Judy, what would you do during the two-week period to improve your chances for success in the new job?
8. What topic would you select for the presentation to the management staff? Why?
9. What might be Judy's future in the ABC Manufacturing Company if she decides that she does not want the promotion?

Case Number 21

I Thought I Knew What It Wanted

by Janice Schoen Henry, Associate Professor and Chair, Department of Information Management Systems, College of Applied Sciences and Arts, Southern Illinois University, Carbondale

James has been working for the Department of the Army since he finished his Political Science degree some four years ago. His current position is that of Assistant Director of Research in the War College; his specialty is to write contractual proposals for special funding.

The War College has a substantial budget that comes through regular channels but relies on special project funding for all the extras that make it the envy of all the military organizations throughout the world. For example, through special project funding the War College is able to conduct very realistic war games that draw attendance from all over the world. This, in turn, places the War College in a favorable light with the Army Command when its military weapons used at the games are sold to foreign military observers for great sums of money.

Special project funds are important to the well being of the War College. As one of the most successful special project proposal writers, James receives recognition from all his fellow employees, from the commanding general on down. He is proud of his status and usually takes great pains to do the best job possible. Therefore, he was totally unprepared for the misfortune that befell him.

The National Science Foundation issued a Request for Proposals (RFP) to universities and branches of the government to develop a special technique for studying the effect of sleeplessness on individuals who are in stressful situations. Usually, the War College ignored this type of proposal, assuming that it was more in line with university research activities. But James argued with his Director that the study could be conducted in conjunction with the war games, when military personnel often went several days without sleep in very stressful situations. "This one is made for us!" he noted. Although this type of research was different from what they usually conducted, and would therefore draw the attention of the top brass, the Director reluctantly agreed that James could draw up a proposal.

"This will be a snap," thought James as he skimmed through the RFP to determine what he would write about. "When we're at war games, our guys are already prepared as subjects for the tests that they want to give." And so he went on to write a proposal based on having a ready-made test group that would be easy to monitor for their reaction to stress. It took him less time to write this proposal than any others he could remember. The war games would offer the perfect test case, and James had already figured out how the experiments could be conducted—even before he finished reading the RFP. He proudly announced to the Director and his fellow-workers that this project was going to be theirs; that's how confident he felt about it.

Several weeks later the War College was informed by the National Science Foundation that their project was not accepted. Instead, one of the universities had been offered the funding. James was deeply shocked. The embarrassment was almost overwhelming, especially since his fellow-workers kept reminding him that his "sure thing" had fizzled. And the Director hardly acknowledged him at their next meeting, except to ask curtly, "I told the brass that we had this one in the bag. What happened?"

"I don't know." replied James. "I suspect that it was the good-old-boys network that the universities have with their academic buddies at the National Science Foundation. You know how those people feel about the Army. We probably didn't stand a chance from the beginning."

The Director told James to follow through with the people at the National Science Foundation and find out exactly what was wrong with the proposal. When James finally got his meeting, he was told that his project simply did not address the detailed aspects of the study. "At first we thought it would be a really great proposal, but as we started reading the details of what you were proposing it seemed that you had ignored our specifications for controlling the events required for the study. It was almost as if you thought you knew better what we wanted than we did in the first place. Remember we wanted you to develop a technique for studying the effects of sleeplessness in high-stress situations that might be found in a variety of situations. However, you proposed to conduct the study only in a war game situation. That type of situation hardly applies to most of what goes on in the world."

James was really humiliated as he reviewed what he had written, especially in contrast to the RFP guidelines. He had assumed that the war games would be such a great environment for the study that he hadn't carefully read the details of the RFP. Now, he would have to go back to the War College and report to the Director what he had done.

1. At what point did James make the mistake that cost the War College the contract?
2. What previous experiences made him think that this one would be a snap?
3. Was James's focus on addressing the proposal or on something else? If something else, what was it?
4. What might James have done to make sure that his proposal addressed the requirements of the RFP?
5. When James reported back to the Director, what could he do to make the most out of the situation?

Case Number 22

Choosing the Best Opportunities—Opportunity Costs

by Roger L. Luft, Professor, Business Education, Eastern Illinois University

Angela Star was a very bright young lady. She graduated from the university she attended with a 4.0 grade point average. She received numerous honors and awards for her excellent achievement in college. She was a pre-med student who was accepted to medical school without any difficulty.

Angela's family was not wealthy by any means, but they did live comfortably. They lived in a sparsely populated Western state. That is where Angela attended university and where both Angela's father and mother taught. Both her parents had Pd.D.'s and had taught at the university for several years. Angela had four older siblings. Each of them had gone to college and two of them had completed master's degrees.

The medical school that Angela chose to attend was located in a Midwestern city, and was considered to be one of the top schools in the country. Angela was a good medical student and excelled in surgical procedures. She decided that she wanted to specialize in brain surgery, which meant that she had to complete a residency in her specialty. Again, she excelled in her chosen specialization and was honored as the top student in her class. It appeared that Angela would have no difficulty in getting a job.

With so many years of school, the loans were adding up very quickly and seemed to be insurmountable at the moment. The state in which Angela grew up and graduated from college had a loan program that she used to the maximum. She was able to borrow $100,000 from her state government at low interest rates. State government developed the loan program to entice bright young doctors to establish medical practice in their home rural state. This was a practice that the state government used somewhat successfully for a few years. In addition, a critical part of her agreement with the state was that if she went back to the state to practice medicine the state would forgive 20 percent of her loan each year she practiced in the state. That meant that after five years of practicing medicine in her own rural state, Angela would no longer owe any of the $100,000.

In addition to the money borrowed from her own state, Angela borrowed several thousand dollars from a bank and even more from her parents. Her parents were willing to make the same offer as the state—if she were to practice medicine in her home state, they too would forgive a portion of her loan each year.

While completing her medical requirements, much of Angela's work had been with a medical group whose doctors were known to be among the best brain surgeons on the country. She liked them and they liked her work and her personality. Angela got along well with each of the doctors in the group and related well with all of her patients. As a result, Angela was offered employment as a member of this medical team, located outside her home state.

In her employment offer, Angela was told that she would receive a beginning salary of $80,000 per year and would also receive excellent benefits including paid health and life insurance, and more importantly, paid liability insurance which for a brain surgeon would carry very high premiums. After three years, Angela would also begin to receive profit sharing from the medical group, which she knew could be a very handsome income supplement. She would be closely evaluated every six months for consideration for a substantial raise. She knew that one other recent new employee was receiving about five percent pay increases every six months. The percentage increase would continue and would likely be more even after she began participation in the profit sharing plan.

Angela Star had a big decision to make. Should she stay where she was, in a position that she knew she liked and as a result have to repay about $150,000 in loans plus interest? Or, should she set up her own practice in her home state in order to have about $125,000 in loans forgiven, and she knew her parents would be happy to have her closer to home as well? Angela had some important decisions to make; fortunately she was single with no serious boyfriend to influence her choices.

1. What is the opportunity cost for Angela Star if she elected to go back to her home state and pass up the job offer from the prestigious medical group? What is the opportunity cost for her home state government for a program like this one?
2. What is the opportunity cost for Angela Star if she elected to accept the job offer with the prestigious medical group and not go back to her home state?
3. What are the factors for Angela to consider when she makes her decision? Make a list of pros and cons for each of the employment opportunities confronting her.
4. Discuss the economic benefits to a state government with a program such as the medical school loan program. Is it more beneficial to the citizens of the state to have the borrowers return to the state, to pay back the loans?
5. How much influence do you think being from a sparsely populated state with restricted opportunities bear on a final decision? What if Angela were from a heavy populated state to which she could return and potentially have greater immediate opportunities?
6. Should state and/or the federal government be involved in programs such as this? How closely related to a 'welfare program' is this type of loan forgiveness program?
7. Essentially the state government is competing with private enterprise when making loans to citizens. Does a state have advantages or disadvantages when compared to private business? What are they?

Case Number 23

The Case of the Vanishing Dream

by James Calvert Scott, Department of Business Information Systems and Education, Utah State University

Kelly Smith glanced up from the stack of sketches on her desk. The light on her telephone was flashing again. She wondered who had a left a voice message this time. She lifted the receiver, punched in her code, and waited for the message.

"Kelly, this is Sue. I'll swing by your office next Tuesday a little before 10 a.m. You can ride with me to the attorney's office to sign the papers. I'm really looking forward to being your business partner. In fact, I can hardly wait to see your new line of designer t-shirts. It's going to be exciting, especially when we go international. I'm already starting to brush up on my Japanese. I've got to go now. I'm off for a long weekend at the beach. See you later. Bye!"

Kelly Smith was delighted that her best childhood friend, Sue Milligan, was about to become her partner in an expanded business venture. Three years ago Kelly had quit her job as a designer for a major fashion company and started her own business. With limited capital she had sweat blood and tears to keep her business going. Operating her own business was more difficult than Kelly had ever imagined. Every day was full of challenges. Meeting the payroll and paying for the goods she sold were sometimes financial crises. Once she was forced to take a personal loan to pay her sales associate and her assistant. Another time she had to delay paying the company that manufactured her products until she received payment from an exclusive chain. To her it seemed as if it was either feast or famine—nothing in between. Business was good or bad for Forever T-Shirts. Every month when she met with her accountant, he expressed concerns about company finances. Would she ever get to the point that cash flow was not a problem? Kelly felt awkward dealing with financial matters. Just balancing a checkbook was a challenge.

Managing the business was not Kelly's real strength either. Forever T-Shirts was surviving and growing, but being an entrepreneur was difficult for Kelly. There were so many business things to consider. Everything changed all the time—often before Kelly really understood it. Being in charge 24 hours a day created considerable stress for Kelly. At times she wanted to forget her business and run away.

Forever T-Shirts was establishing a name for itself with unique designs for casual resort wear. Through trial and error Kelly realized that there was money to be made by selling to upscale stores. Customers of boutiques, specialty stores, and high-class chains would pay big money for exclusive designs. All she needed were some chic designs to sell season after season. Kelly could create, promote, and market those stylish products easily.

Kelly's real love in life was designing. She was born with a real sense of fashion. She cultivated her design talent through a degree program in fashion design at a prestigious eastern school. When she finished her degree, she had seven job offers. She launched her career with a major fashion company. She met instant success. The second year she was named the most-promising young designer in the country. Her talents as a designer were recognized. Her place in the fickle fashion business was assured.

After seven years in the fashion industry, Kelly realized that she was burning out. She grew increasingly tired of the mounting pressures to design several full collections each year. Her output of several hundred popular designs a year was making other people rich. They were profiting from her design talents more than she was. This really bothered Kelly, who believed she wasn't getting her fair share. After all, it was her clever designs that were responsible for most of the company sales.

What Kelly really wanted was more independence, more design control, and greater lifetime income potential. When she confided to a friend about her desires, he suggested that she start her own fashion business. The more Kelly thought about it, the more she liked the idea. When she won her second national fashion award, Kelly decided to quit her job and start her own business. She focused her attention on upscale casual resort wear, a lucrative market she knew well.

Things would be better now that Sue was joining the Forever T-Shirts team, Kelly thought to herself. Finally I can concentrate on design and manufacturing. Sue can take over the business side. After all, she has a degree in management and nine years of business experience. She really knows her stuff. Best of all, she's investing a lot of money in the business. The $150,000—$50,000 from Sue and an additional $100,000 from Sue's wealthy parents—will really help. Finally Forever T-shirts won't be

financially strapped. We can pay the bills on time and have money left over for expansion. Sue's idea of selling products in Japan is shrewd. Rich Japanese women really go for my designs. They like my kind of style. And they'll pay through the nose for something with an exclusive name and design. Sue really understands the Japanese language and culture. Besides, she's already worked there and knows their business practices. How can we fail? At last Forever T-Shirts has a bright future.

Kelly's thoughts about the future were soon interrupted by the sales associate, Ted Bacca. Since it was nearly noon, Kelly suggested they have a working lunch at a place about a mile away. On the way there, they heard a breaking news story about heavy rains and gale-force winds at the coast.

During the leisurely lunch Ted briefed Kelly about his recent sales efforts. The new line of designer t-shirts was especially popular. In fact, Ted was 100 percent certain that he could sell 50,000 more if they could be produced quickly. Kelly replied that quick production would be very difficult given the constraints of current production schedules and finances. The latter was a bigger obstacle than the former, she said. "With plenty of money, though, almost anything is possible," Kelly mused.

Suddenly an idea clicked in Kelly's head. She remembered the cash that Sue had promised by the end of the month. With Sue's $150,000 and a loan, Forever T-Shirts could finance the extra production run. Forever T-Shirts could sell those additional 50,000 designer t-shirts and make an even greater profit. Her idea, she thought, was brilliant, absolutely brilliant.

Abruptly Kelly cut Ted off in mid sentence. She picked up her cellular telephone, dialed the garment manufacturer, and arranged for the prompt production of 50,000 more t-shirts. She was pleased that her extra order could be scheduled so quickly. She was less happy about the $70,000 fee for priority production. That added expense would reduce the profit Forever T-Shirts made. Kelly was proud of herself; for once she had seized the business initiative.

Next Kelly called her bank to check on her line of credit. The loan officer was taken back by what Kelly had done. He questioned if the additional items could be sold since they would arrive in the middle of the season. He also was skeptical about the $150,000 from Sue that was part of the financing. He pointed out that there was no certainty about either of the assumptions underlying Kelly's plan. In his words, "The plan is quite risky." After he checked bank records, the loan officer seemed somewhat less critical of Kelly's decision. The additional amount of bank financing Kelly wanted reached but did not exceed the maximum line of credit. Consequently, the bank official grudgingly approved the request. The tone of his voice, however, made it clear to Kelly that he personally disapproved of her latest business decision.

Hearing only half of the two conversations, Ted was sure that Kelly's latest plan would be a success. He liked her optimistic, take-charge attitude. To celebrate the new business project, they ordered a bottle of champagne. After their glasses were filled, Kelly offered a toast: "To a very profitable venture this season and to the super sales associate who will bring it about." Somewhat embarrassed, Ted responded, "And to the creative wheeler-dealer who recognized and seized the opportunity."

It was nearly 3 p.m. by the time the two returned to the design studio. As soon as they entered, Kelly's assistant told her that her father had telephoned five times in the last hour. Immediately Kelly realized that something was out of the ordinary. She quickly dialed her father. He answered on the first ring.

"Kelly, is that you?" he asked.

"Yes, Dad, it is. What's up?" she questioned.
"Kelly—Kelly, I don't know how to tell you this. Something bad has happened. Are you sitting down? You'd better sit down for this. Uh—a rock slide—uh—crushed Sue's car near Whaler's Cove. I'm afraid she didn't make it, Kelly."

"What do you mean, Dad?"

"Sue is—uh—duh—uh—dead. I'm so sorry, Kelly," he said.

There was silence.

"Kelly, are you still there? Kelly, are you there? Can you hear me?" he queried in an increasingly concerned voice.

Stunned, Kelly lay the receiver down and blurted out, "Sue's been killed." Before she could express her sudden grief, an even more terrifying thought entered her mind. "My business," she gasped. "It's dead."

1. In what ways was Kelly Smith suited to be an entrepreneur?
2. In what ways was Kelly Smith unsuited to be an entrepreneur?
3. What contributions might Sue Milligan have been able to make to Forever T-Shirts?
4. What factors did Kelly Smith forget to consider when she tried to get rich quickly?
5. Why are financial matters so important for a successful proprietorship?
6. Why do you think Forever T-Shirts had difficulty in meeting its financial commitments?
7. What options does Kelly Smith have now that Sue Milligan is dead?
8. What common sayings reflect lessons that can be learned from The Case of the Vanishing Dream?

Case Number 24

Mr. Guy

by Kenneth J. Kaser, Marketing Education Coordinator, Dulles High School, Sugar Land, TX

Mr. Guy is a successful specialty-clothing store that has been in business for 90 years. Mr. Guy is located in a growing Midwestern university town. The store has always been a family operation known for specialized service to customers. Twenty years ago, Mr. Guy was at its peak, having three stores. Today, Mr. Guy has one store located in the only shopping mall in the Midwestern city. Annual gross sales for Mr. Guy are $2.5 million. The shopping mall, which was recently remodeled, is owned by a group of investors from another state. Shopping mall space rents for $40 per square foot. Mr. Guy is locked into an old mall rental agreement for $14 per square foot. The store's owner has rented the same 2,500 square feet for a low rental rate for the past 35 years; the lease is good for six more years.

The president of Mr. Guy is the grandson of the founder of the store. Bob Massey has been the manager at Mr. Guy for the past 15 years. Because Mr. Guy has such a large store area at a low rent price, Bob has experienced increased pressure from the owners of the mall to split up the 2,500 square feet among several stores for $40 per square foot. Bob faces many challenges as the manager of a local specialty store that competes with large national chain stores such as Macy's and Saks Fifth Avenue. Mr. Guy is financially sound with current sales and expenditures; however, once the lease expires, many decisions will have to be made.

The store has not been remodeled for the past 35 years and needs to be updated. Remodeling will take approximately two months to complete. Favorable relations must be maintained with the owners of the mall; however, remodeling must also be a top priority. Currently, Mr. Guy leases out space to a shoe store, a tuxedo rental shop, an upscale gift shop, a famous college bookstore that sells university clothes, and a candy store. Bob Massey must decide to which stores Mr. Guy will continue to lease.

It appears that Mr. Guy will lose its lease at the mall in six years. Consideration must be given to a possible new location. A new mall located in a different part of town is scheduled to begin construction in one year. The new mall should be completed in two years. Bob has been contacted by the owners of the new mall and has been offered lease space at a rate of $30 per square foot. Space at the new mall is rapidly being leased and is expected to be leased completely within the current year.

1. Who are the key participants in the case?
2. What are the key issues in this case?
3. What are the long-term factors that must be considered by Bob?
4. If you were Bob, how would you determine to which stores to continue leasing?
5. How can remodeling be accomplished without interrupting normal business for two months?
6. What should Bob be doing now to prepare for six years from now? for two years from now?
7. What should be emphasized in advertising to set Mr. Guy apart from the big competitors?
8. As a consultant, what tactics would you suggest that Bob use when dealing with the current shopping mall owners?

Case Number 25

The Great Defender—International Business

by Roger L. Luft, Professor, Business Education, Eastern Illinois University

Bill and Terri Middleton were in the business of manufacturing one of Bill's inventions—a product that was used by homeowners to keep rodents off and away from their property. The invention emitted a sound that was detected only by rodents, and frightened them away from an area of 150 feet within placement of the device. The device was called the Great Defender, or affectionately referred to as 'GD'. The Great Defender was about the size of a man's small wallet and was battery operated. Its components were all electronic.

Bill and Terri had experimented with GD for a few years in order to get the right sound that could only be detected by rodents. They lived in a rural wooded area and had problems with mice and moles. The moles destroyed their garden and ate the bulbs from many of their flowering plants. They were unsuccessful in ridding the pests using any other means and they did not like killing any kind of animal.

Bill was an electronic engineer with a communication company. He designed and engineered many communication devices. Terri was a zoologist with a specialization in animal behavior. While studying rodents was not of great interest to her, she conducted considerable research in order to determine the best methods to rid their property of the rodents.

With the combined backgrounds of Bill and Terri, they knew they could collaborate to develop an electronic product to control rodents. They also knew that the potential market for such a product was huge, not only to rural residents, but to property owners in cities. They got a patent on the Great Defender and started manufacturing the device. The requirements for manufacturing were not great once they had a mold for the case into which the electronic parts would fit. The rest of the manufacturing was primarily assembling the electronic components and inserting them into the waterproof case and connecting a wire to the small speaker. They were able to buy all the components from electronic manufacturers in the United States and they found a local company that would manufacture the cases at a low cost. The end result was a product that was very affordable for the clientele they wanted to reach.

Bill and Terri contracted with a small company to help them market their product and in a short time they had the device in several stores in their state. They had to expand their production facility and employ more workers. That wasn't a problem since they were generating sales beyond their expectations. As sales began to grow, they signed contracts to provide the device for sale in some large national retail chains. Demand for the product continued to grow but they were able to keep up with the demand. With the increased demand, they were able to employ more workers to assemble the product, and they were enjoying large profits from the sales. By this time, Bill gave up his engineering job to manage the business, and was also working on other inventions. Terri also worked full-time in the business and handled all the personnel details.

One day in June, the Middletons received a long distance telephone call from a company in Korea that heard about their product and wanted to begin importing the Great Defender for sales in Korea and throughout the far East. On the same day, another call was received from a company in Malaysia that wanted to import the product for distribution to Southeast Asia. This was a big step for the Middletons. They certainly wanted to see their sales grow, but questioned whether or not they would be able to handle production. International business dealings were something they had never really thought about and weren't prepared to address at the present time.

The Middletons need answers to several questions:

1. What options do the Middletons have if they want to get their product in the hands of distributors in countries other than the United States?
2. What considerations are there if they want to establish a manufacturing facility in Korea or Malaysia rather than exporting the products from their U.S. location?
3. How does someone who knows nothing about international business learn the best ways to do business internationally?

4. If the Middletons decide to manufacture their products in the United States to be exported to Korea and/or Malaysia, what do they need to know about currency exchange rates? What affect would changes in currency rates have on pricing their product?
5. Should the Middletons know anything about the social and cultural differences of the countries in which their products would be sold? What should they know and how would they find out?
6. Is it necessary for one or both of the Middletons to visit the countries before they decide to market their product in those countries? What would be the benefits of visiting the countries?
7. List all of the recommendations you would make for the Middletons to consider before they make a final decision.

Case 26

To Grow or Not to Grow—Supply and Demand

by Roger L. Luft, Professor, Business Education, Eastern Illinois University

Rocco and Gina Tritino were a newly wed couple who saved all the money they could for five years so they would be able to open the bicycle shop of their dreams. For five years, each one of them worked two jobs so they could save as much as possible for their business. They had limited hours for social activities and when they did have free time, they spent it with their families. They worked very hard and were very committed to their dream. They did a lot of research on bicycle shops and knew exactly what they wanted. They even had a business plan developed and would be able to start searching for a business location as soon as they had enough money.

After five years of saving and living as simply as possible, the Tritinos had the money they needed...their goal had been reached. They started the actual process of opening the business. They were able to open the business as planned and on schedule.

Two years had passed and the business was growing beyond all expectations, but so was the Tritino family. Gina was about to give birth to the couple's first child. Up to this point she had been at Rocco's side at the business. Now Gina would want to stay home with the new baby because that is a value that she grew up with—if you have children, you give them your attention until they are old enough to make some decisions of their own.

This development in the Tritino's life was not as well planned as the business they operated. And, as excited as they were to be starting a family, both Rocco and Fina knew that something would have to change with the business. Gina had been the main person in the continuing growth of the business. She had a keen sense of knowing exactly what to do and when to do it. She handled all of the promotional activities and was excellent with customers. She had even talked about how they could expand the business and had some ideas about timing the expansion.

Rocco and Gina sat down one evening after a very demanding day at the bicycle shop to discuss the future of their bicycle shop. They had just finished a back-to-school bicycle promotion and had sold twice as many bicycles as they expected they would. They had no idea that their only competitor in town was having financial difficulty and was planning to close at the same time the Tritinos were starting this promotion. As it turned out they were now the only bicycle shop in the small town of 25,000 people. The shop that closed was located across town, while Rocco and Gina occupied a location near the community college and the high school.

In their discussion, Rocco and Gina talked about expansion. Should they make their store larger or build a new store in a different location? Should they expand their product line? Should they add depth to their current product line?—would suppliers be able to provide the same services they have had in the past if they grew larger? Could they meet the demands of their customers and still provide the services they wanted to provide? What about pricing products as demand grew? Many questions needed to be answered. Gina made some estimates related to the weekly sales for their most popular bicycle based on different pricing schemes, and used the following illustration to raise her questions to Rocco. She knew that if they granted different size discounts on the bicycles the sales would change in proportion, but she hadn't taken the time to graph her estimates.

PRICE	QUANTITY DEMANDED	QUANTITY SUPPLIED
$600	5	95
$550	20	80
$525	35	65
$500	50	5
$475	65	35
$450	80	20
$6425	95	5

Up to this time, the Tritinos have consistently given discounts that were different for each customer based on the number of bicycles the customer might buy. For example, if someone wanted one bicycle, and it was a top-of-the-line bicycle, the customer might receive a $50 discount on each bicycle depending on the prices of the bicycles.

The Tritinos knew that if Gina was not at the store, sales could suffer, at least temporarily. With that in mind they wondered if expansion should wait for a few years. They wondered about their pricing policies and what would the demand be if a new competitor opened for business in town. They talked about the supply and demand for their bicycles at the different prices, and if they could make profits if lower prices were used. They also knew that the more bicycle they purchased from their suppliers, the better price they could receive.

Help the Tritinos out by completing the following:

1. Draw a demand curve and a supply curve using the information in the table presented above.
2. Use your demand and supply curve to determine equilibrium price for the most popular bicycle model in the store.
3. From your curves, what did you find to be the equilibrium price?
4. What would be the result if the Tritinos planned their inventory to sell 95 bicycles per week at a price of $600 each? What if they lowered the price to $425 but were only willing to sell five bicycles at that price...what would be the result?
5. At what price should the Tritinos sell bicycles to earn the most revenue?
6. If the Tritinos were forced to raise their prices because their costs went up, a new supply and demand curve would result. Draw new supply and demand curves based on an increase of $20 per bicycle.

7. How does this information help the Tritinos in making decisions about expanding their business? About pricing products? About profitability in a business?
8. If the Tritino's bicycle shop is the only one in town, what degree of competition do they have? What would their business be called?
9. To what degree should the Tritino's personal values enter into their decision? How would you factor the "worth" of Gina's time into the decision process?

Case Number 27

The Case Of The Taxing Matter

by James Calvert Scott, Department of Business Information Systems and Education, Utah State University

Jeff Buttersworth walked into his office, closed the door, and collapsed into his chair. Glancing down at his watch, he noted that it was already 3:45 p.m. on Friday. He had to endure only an hour and fifteen minutes more of work. Then he could go home and relax. Soon he would be making one of the most important decisions of his career. By the time he returned to work on Monday, he would have an answer for Governor Broadbent.

Jeff Buttersworth enjoyed his job as one of the three primary advisors to Governor Sheila Broadbent. At times the pace of his work was hectic. His job assignments varied greatly and were often challenging. They made good use of his bright, analytical mind. Best of all, he was a valued member of the inner circle. Governor Broadbent listened carefully to his thoughtful analyses and recommendations. She often echoed them in her public statements.

Governor Broadbent was generally popular throughout the urban western state. Nevertheless, her public support had declined in recent months. Both the state and national economies were turning downward. Unemployment was increasing; so was inflation. Citizens were increasingly concerned about the future. As a candidate for reelection in the fall, her positions on matters were very important. She had to position herself carefully to stay ahead of political challengers. The other party had its eye on the governorship.

Recent polls had revealed that taxes are the number one concern of voters. Consequently, Governor Broadbent needed to take tax-related positions that were popular with voters. Jeff Buttersworth knew that he had to guide her through the sales-tax-on-food battlefield.

In a state of exhaustion, Jeff Buttersworth folded his arms across his piled desktop. He yawned and lay his head on his arms to rest for a minute or two. Before he knew it, he was asleep. He was soon in a dream state. Pieces of events of the past two weeks fast-forwarded through his mind. The effect was like badly edited bits of film. Shortly after one scene began, another abruptly replaced it. The scenes came rapidly.

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"Whether the sales tax on food should stay or go is an important matter," declared Governor Broadbent. "My reelection may depend on how we address this issue. I'm depending on you, Jeff, to guide me on this thorny issue. Of course, you'll have the full assistance of my staff on this one. Give me your best analysis and recommendation. And don't take too long."

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Governor, Can You Spare a Dime? read the newspaper headline. Underneath was a picture of mothers and children protesting at the capitol building. One sign read "Don't Tax Our Food"; another, "Please, Can I Have More Food?" The related feature story focused on the struggle of a welfare mother to feed her four children. She was quoted as tearfully pleading, "Gov'nor, can ya spare a dime? My kids is hungry. They need more food. That tax on food, it robs my babies of food."

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"The sales tax on food is an emotional issue," cautioned the governor's chief of staff. "Given the recent media coverage, this issue could explode at any time. It is both an economic and a political matter. We must do all we can to protect Governor Broadbent."

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"The sales tax on food reduces the amount that people can spend for food," argued one consultant. "It hurts the less well off."

"True," countered another, "but then everyone pays some taxes. A lot of middle-class taxpayers dislike poor people getting off Scot free. Shouldn't they pay a little tax to offset all they get? We better-off taxpayers don't have bottomless pockets."

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"Dropping the sales tax on food would be popular. After all, everybody consumes food and would benefit if it were dropped," argued the political advisor.

"Not so fast," interrupted the financial analyst. "Millions of dollars of state revenue would be lost. From what other tax source would those dollars come? If they don't come from somewhere, the state budget will not balance. The expenditures will exceed the revenues. By law the state must have a balanced budget."

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Suddenly Jeff Buttersworth roused in response to the ringing telephone. He lifted the receiver and slowly responded, "Jeff Buttersworth speaking. How can I help you?"

"Jeff, are you all right? You sound a little—well, different," the pleasant-sounding voice said.

"Oh, Governor Broadbent, I'm fine. I guess I'm just a little tired," he replied. "I've been giving a lot of thought lately to the sales tax on food. It is a complex matter with no easy solutions."

"Jeff, we have a little problem. A source tells me that my likely political opponent in the fall will hold a news conference tomorrow at noon. He will declare his opposition to the sales tax on food," Governor Broadbent confided.

"That is bad news, Governor," consoled Jeff Buttersworth. "I was hoping that we'd have a few more days to weigh the facts. We have to think this through carefully. The economic consequences are significant."

"But we can't let the opposition get the upper hand on this issue. I've got to go public with my position before my opponent does. Jeff, I'm depending on your best advice. My future as governor may be on the line. The stakes are that high. Jeff, what should my position on the sales tax on food be?" Governor Broadbent questioned.

"Well—uh," Jeff responded, trying to collect his wits.

"I'm waiting for your answer, Mr. Buttersworth," stated the testy governor. "The clock is ticking. I don't have all day."

1. What are the major issues in the case?
2. What are the economic arguments for a sales tax on food?
3. What are the economic arguments against a sales tax on food?
4. What are the political arguments for a sales tax on food?
5. What are the political arguments against a sales tax on food?
6. What role, if any, do you think political considerations should have in determining the fate of the sales tax on food?
7. If you were Jeff Buttersworth, which position would you advise Governor Broadbent to take on the sales tax on food? Why?

Case Number 28

A State's Moral Dilemma—Promoting Gambling

by Roger L. Luft, Professor, Business Education, Eastern Illinois University

Most states in the United States are involved with marketing their tourist attractions. Some states have more attractions to offer than other states and may even promote themselves internationally. Other states, for example those with less attractive scenery, may have other reasons for people to visit. Regardless of the reasons tourists visit, it is beneficial for a state to attract as many visitors as possible because of the amount of money the visitors spend in a state. The tourists purchase goods and services and since almost every state has a sales tax on goods purchased, the state benefits from the sales tax collected.

In recent years, more and more states are allowing gambling of some sort. Many states have a state-run lottery; other states have privately-owned river boats where gambling produces high revenues for the owners and taxes for the state; some states allow only bingo, which seems to attract more of the elderly population; and, in other states, the Native Americans benefit from gambling on their reservations.

Most of the time the state benefits financially from the influx of visitors who get involved with gambling in the state. In some states it is easy to determine that gambling is the primary tourist attraction, while in other states, the effect of gambling on tourism is not so easy to ascertain. The gambling opportunities also seem to attract conventions to some cities. While much of the gambling is privately-owned and run, states benefit from the revenues.

States that allow gambling of one type or another often use this feature as a part of their marketing plan to attract more tourists. This is especially true of the states that allow major types of gambling. Some taxpayers feel that a state that gives too much "hype" to gambling is being unethical and gambling should not be the featured attraction for tourists. Still others feel that the more money tourists spend on anything in the state, the better it is for the state's tax situation. Likewise, the more marketing of the gambling opportunities in a state, the more the citizens of the state will also spend on gambling. Some groups would argue that many of the people who are attracted to the marketing hype for gambling are the same ones who cannot afford to participate. These groups argue that many welfare recipients are the first in line to buy lottery tickets and participate in other forms of gambling, hoping for that "big win" that will get them off of welfare and into the lap of luxury.

1. Discuss the ethics of state governments promoting gambling as a primary attraction for travelers to visit a specific state.
2. What if gambling is not promoted as a primary attraction but as a byproduct of things that are available to do in a state? Do you think this type of marketing campaign would change the concerns of those who feel that states shouldn't promote gambling? To whom would this type of promotion appeal?
3. If a state were to only target their marketing campaign for gambling opportunities to out-of-state audiences, do you think that type of marketing campaign would change the way some feel about the marketing plan? To whom would this type of promotion appeal?
4. Should state governments listen to the concerns of groups who don't want any gambling in the state? What might motivate such opposition and how can such opposition effect the design of a promotional campaign?
5. When a state spends money to market tourism, it is spending taxpayers dollars. How much voice do you feel taxpayers should have in saying how the money is spent?
6. If you were the state director of travel and tourism, would you promote gambling in your state, assuming that your state has gambling opportunities? Why or why not? To what extent would you let taxpayer opinions influence your actions in promotion of gambling?
7. How should a state government promote travel opportunities in the state?
8. Should a state be concerned about the welfare of individuals who are involved with gambling activities? Or, should a state take a hands-off approach? Provide a rationale for your answer.

Case Number 29

The Case of the Dastardly Deeds

by James Calvert Scott, Department of Business Information Systems and Education, Utah State University

"The common stock price has fallen 17 percent in the last month," emphasized the chief executive officer. "No one wants to buy our shares in spite of our record-breaking earnings and bright future. Investors are really fickle. They're scared away by the media. One employee does something stupid, and the entire corporation pays. We've got to fire this O'Leary woman now. We can't afford to wait another minute," he snapped. "She's costing us lots of money."

"But, Jim, this is a very complex matter," cautioned the vice president for human resources. "We have a public relations problem, a serious one. It's hurting all of us in many ways. But we haven't heard her side of the story. To be fair, we've got to do that."

"Frankly, I care less about her than how her actions affect my wallet. She is hurting you and me in our wallets," groused the upset vice president for financial services. "My shares of company stock are worth $43,000 less today than four weeks ago. I've got to be concerned—very concerned. Remember I'm retiring at the end of the year. My company stock is part of my nest egg. I'm counting on it to be there when I need it. Without its full value I may not be able to take early retirement. The way things are going, I wish I'd never invested in company stock. Almost thirty years of contributions to the stock-purchase plan are going down the drain before my eyes. Worst of all, I'm powerless to do anything about it," he grumbled. "What can we do? Does anyone have a good idea?"

Estrella Inc. is a publicly held corporation traded over the counter. It hopes to be listed on the New York Stock Exchange within the next five years. The company manufactures parts for many consumer appliances. In spite of economic cycles, Estrella Inc. has been a consistent performer. It has grown from a proprietorship to a corporation over the past forty years. Steady growth and consistent profits have characterized its evolution. Its sales have grown faster than those of its competitors. It now is the third-largest company of its type in the country. Always a well-managed business, its shares have been popular with investors—employees and the public alike.

The past month has been difficult for the executives of Estrella Inc. Several unexpected events have tarnished its image. Just when the top leaders thought things were looking up, there was another disaster.

First, one of the star company salesmen was arrested for illegal activities. Caught soliciting in a vice squad sting, his company car was confiscated by the police. Estrella Inc. forfeited the $38,000 BMW car. Worse yet, a television news story about the vice squad showed the salesman being arrested. The company logo was plainly visible on the car door, and it was broadcast nationally. Publicity about the incident upset a number of shareholders across the country. Their complaint letters expressed concern about the morals and ethics within Estrella Inc.

Second, a careless line worker dropped a burning cigarette in the chemical-storage area of the main company plant. A few minutes later this resulted in an explosion and fire. Miraculously, no workers were injured, but part of the plant was burned down. Nearly 200 workers had to be temporarily laid off while the area is being rebuilt. To maintain good employee relations, the company agreed to pay its idled workers half their normal wages. This action infuriated a small group of outspoken stockholders. It quickly organized a press conference, where it threatened to unseat the board of directors. It promised to "wage war" for favoring employees over owners. Four days later an aggressive reporter broke a related news story. It said that investigators found 17 violations of health and safety laws at the fire site. Estrella Inc., it reported, would likely be fined more than $25,000.

Third, an unhappy former employee filed a $15 million lawsuit for sexual harassment against his supervisor, his supervisor's supervisor, and Estrella Inc. The media are having a heyday with the lawsuit. It is notable because a male alleged that a female repeatedly sexually harassed him. The lawsuit further charged that officials of the company knew about the problem but did nothing.

The media coverage since the lawsuit was filed two days ago has been intense. The once local story is now a national and international story. A feature story on today's front page of the only nationwide business newspaper focused on the charges.

Cable news channels are now broadcasting similar stories around the world.

"We are doing all we can to put the best face on this," responded the defensive public relations head. "My staff is working around the clock on this nightmare."

"It's not good enough. We've got to do much better if Estrella Inc. is to survive. This company looks like a bunch of jerks. Almost everyone in the whole world thinks we are jerks. One disgruntled employee makes charges, and the whole world *listens*. The EEOC—*Equal Employment* Opportunity Commission—is breathing down our necks. This is embarrassing. The good name of Estrella Inc. is being dragged through the mud. It simply has got to stop—now!" snapped the distressed chief executive officer.

"Calm down, Jim, calm down," pleaded another officer. "We're all trying our best to get a handle on this messy situation."

The chief executive officer continued his tirade: "Heads are going to roll clear to kingdom come before this is over. Who's responsible for this dirty little secret gone big time? What are the facts? Who is the culprit? Where is he or she hiding?"

The vice president for manufacturing replied, "No one knows all the facts. That's the real problem. We do know that Bob Stonehill has charged that Mary O'Leary sexually harassed him."

"Does he have any witnesses?" questioned the chief executive officer.

"My preliminary investigation indicates he has several," the vice president for human resources replied. "One overheard him tell O'Leary that her actions were inappropriate and unwanted. A coworker reported seeing a draft of a memo to O'Leary that described the offensive actions and asked her to stop them at once. It had a copy notation to her supervisor. I think it was dated about six months ago, long before he resigned. If that memo was sent, his case is strengthened. I haven't yet been able to track down O'Leary's supervisor to check. He's on a safari in Africa—won't be back for two weeks. As always, employees are on vacation when you really need them. Oh, yes, that coworker also said that his friend had a log detailing the harassment incidents. The situation doesn't look good to me. I'm afraid we could lose this one unless someone has an ace up a sleeve."

"Well, I think this whole thing is a bunch of bunk. How can any red-blooded man be sexually harassed by a woman?" the vice president for financial services questioned. "Women just don't do that kind of thing."

"But they do, George," piped up one of the younger officers. "One unexpectedly backed me into a corner a few years ago and started to—well—uh—put the moves on me. It happened right in my own office, I swear. I doesn't happen too often, fortunately, but it can."

"I wish I had your luck," George retorted. Laughter filled the somber room, breaking the tension somewhat. Everyone was laughing except the chief executive officer.

"Let's get serious, please," begged the irritated chief executive officer. "May we have order so we can finish our meeting? Estrella Inc. is having a hellish month. Nothing is going right. Every time I turn around, some employee does something stupid. The media picks up on it, and the company gets the wrap. Sooner or later every stupid employee mistake costs Estrella Inc. money—lots of it. Every stupid employee mistake costs our shareholders—you and me. We've got to protect and preserve the company," he implored.

1. What are the dastardly deeds in the case?
2. Do you think that the chief executive officer of Estrella Inc. is overreacting? Why or why not?
3. Do you think that a company should be concerned about what its employees do off the job? Why?
4. To what degree do you think stockholders should hold the board of directors accountable for the actions of company officers?
5. Why were Bob Stonehill's charges against Mary O'Leary so attention-getting?
6. What are the economic and non-economic costs associated with each dastardly deed?
7. Do you think that the media acted responsibly when it reported negative information about Estrella Inc. and a few of its employees, information that depressed its stock price? Why?
8. Someone once said that sooner or later, everything boils down to money. Was that person wise or a fool? Why?

Case Number 30

To Buy or Not to Buy—Importing

by Roger L. Luft, Professor, Business Education, Eastern Illinois University

Dave and Mary Hartwell owned three retail sporting goods stores in a large city in the Eastern United States. They had annual sales of well over $1 million at each of the stores. They both worked in the business, but had managers and assistant managers at each of their stores. Dave assumed the role of marketing director and Mary handled all the finances. Store managers were responsible for all their own personnel decisions.

The Hartwells opened their stores over a five-year period, two in suburban areas, and one in a downtown location. They experienced steady growth in their company and learned who the best and most reliable suppliers were, but they also knew that they had to look for additional suppliers as their product lines expanded.

Recently they had been discussing the possibility of opening a fourth store in a new shopping mall that was being built. They had been approached by the developer who was a friend of theirs and whose judgement they trusted. The developer was giving them first option on a full-line sporting goods store in the mall. They knew there would be national chains like Foot Locker that would also be in the mall and would provide competition, especially with footwear.

Dave and Mary were actively involved with their local chapter of Rotary International, which recently hosted a contingent of business executives from Taiwan. One of the business executives, Mai-Li Chong, who spent several days with the Hartwell's, owned a sports apparel manufacturing business. In her business, she contracted with large brand names for the manufacture of sports apparel. Mai-Li's business manufactured running wear, tee-shirts, shorts, and other fashion sports wear. Dave and Mary were familiar with some of their products because they carried them in their stores with national brand names on the tags.

Mai-Li presented an interesting proposal to the Hartwell's—they could have their own brand name merchandise to sell in their stores. Mai-Li felt that the Hartwell's had enough sales volume to be able to meet the minimum order requirements. Orders could be placed directly with the sales agent in Taipei and the finished products would be shipped directly from the manufacturing facility to the Hartwells central receiving point. The Hartwells were quite intrigued with the thought of having their own brand name on products that were of the same quality as the national brands they carried. Even more provocative was the fact that the products would cost them less and they could sell them at prices lower than the national brands.

The most disturbing thing for the Hartwells was their lack of knowledge and experience in dealing with international companies. They knew little about importing products from other countries. It was a situation that seemed too good to pass by. The name recognition coming from their own brand name could help with the growth of their company. Some important decisions had to be made.

1. What must the Hartwells learn about importing products made in a foreign country before signing a contract with Chong's company?
2. Where could the Hartwells go to learn more about the details of importing foreign-made products for sale in the United States?
3. If the Hartwells decide they want to import clothing from Taiwan, what would be the best way for them to do it? Should they work directly with Chong's agent, or should they be represented by someone more knowledgeable about importing than they are?
4. Where do you think companies like Nike, Reebok, Avia, Adidas, or Asics have their products manufactured? Look at some clothing items with those labels to see where they were made. Are those five companies American companies or are they foreign owned?
5. What kinds of cultural differences are the Hartwells likely to experience in dealing with the Taiwanese? Should the Hartwells make a trip to Taiwan to learn more about the company and the country before closing a deal?
6. What are your recommendations to assist the Hartwells in their decision making process?

Case Number 31

LeStyle Department Store

by Kenneth J. Kaser, Marketing Education Coordinator, Dulles High School, Sugar Land, TX

LeStyle is an upscale clothing store that carries the latest fashions for men and women. LeStyle takes pride in the personal service it gives its customers. Many of the full-time salespeople have regular customers who come in the store weekly. Full-time salespeople at LeStyle are paid a commission of 8.5 percent (before tax) on each sale they make. They receive a salary draw each month, based upon the assumption that they will meet their annual sales quota. If they sell more than their quota, they receive income in addition to their salary draw. If they sell below quote for the year, their salary for the first month of the new year is reduced proportionally. The quota is based on average annual sales production of LeStyle; the quota is re-assessed each year. Part-time salespeople are paid $5.50 per hour plus 1 percent on sales (before tax).

The clothing business has busy and slow times during the year and each week. Slow times do not produce much income for the full-time salespeople. Usually the store is staffed with one part-time and three full-time salespeople in the men's department during the day and with two full-time and two part-time salespeople at night. Competition for customers' business is quite high, especially among the full-time salespeople. On slow business days, as many as two or three full-time salespeople will ask to assist the same customer. This process often results in frustration for the salespeople and the customers. Many customers have simply left without purchasing any items and have stated that they felt uncomfortable with the competitive situation.

The part-time salespeople are more relaxed and usually very helpful to the customers. Since their income is not tied solely to the commission on sales, they do not feel that they have to "grab" every customer who comes into the store. Often, the full-time salespeople resent the part-time salespeople and will intercept customers or make the part-time employees do menial tasks, such as straightening the displays. This process decreases the incentive for the part-time salespeople to sell at their greatest potential.

During the holiday season, sales were brisk and everyone had plenty of sales to make them happy. However, the past two months have been unusually slow, and tension is rising. Roger, a full-time salesperson, has been the top salesperson in the department for several years, but now Roger is worried about his future financial stability; he wonders how he will pay his personal bills.

1. What are the potential organizational conflicts in this case?
2. What are the potential interpersonal conflicts in this case? Who are the key actors?
3. How can these conflicts you identified be resolved?
4. What would be an equitable formula for scheduling salespeople?
5. What are the advantages of paying commission? Disadvantages?
6. If you were a salesperson earning commission, how would you plan to ensure yearly financial soundness?
7. What effect, if any, could the current internal competitive solution have on LeStyle's ability to compete with vendors seeking the same customers?
8. What incentive system would you recommend? Provide a rationale.

Case Number 32

Horizon Training Services

by Craig A. Agneberg, President, Blue Sky Interactive

After spending a couple years with a software development/PC Support firm, Randy decided to accept a position with a relatively new multimedia software development company, Horizon Training Services (Horizon). Their main headquarters were in Minneapolis, MN with a multimedia development group located in Kansas City.

Horizon's main goal was the development of computer-based and video-based training centers in major metropolitan areas. The centers would be located near larger companies or in the heart of downtown business districts. The concept was to provide training to client employees on a timely basis. The employees could arrange training for their lunch hour, come in early or late in the day, or even take the training after work. Whatever fit into their schedules was accommodated. Horizon could provide this training on-demand because it was individualized and was either computer or video-based. There were no instructor schedules or specific class times to fit into. If a student wanted to spend a couple hours on a course one day and take the rest of the course the next, it was easy to accommodate since it was individualized.

The president of Horizon, John Miller, had developed a learning center approach similar to this in his training management position within a large Minnesota-based company. The learning center was easily justifiable based upon the number of days and significant expenses that employees were costing the company traveling off-site and around the country to get proper training. Plus their traditional training was not individualized and didn't always meet the objectives and needs of the individual learners. Upon the successful implementation of the learning center concept into the company, John decided to leave the company to pursue his own company which would develop learning centers in larger U.S. cities.

Meanwhile, Bob Hazelett was in Kansas City putting together a multimedia development group that was developing computer-based training, information kiosks and performance support programs for large Fortune 500 clients. This group was also developing software that would be used in the learning centers to track individual users and what courses they had completed. The software would provide corporate training departments with individualized results for each learner. It seemed like a dream come true for Randy to step directly into Horizon and begin contributing. He was hired as a Vice President for Educational Development. When Randy joined the company there was John, the President, and two staff members located in Minneapolis. Bob was Vice President for Multimedia Development and had two multimedia programmers and one graphic designer working with him in Kansas City. After conducting some initial investigation of the company and reading its literature, business plan, and venture capital prospectus, Randy signed a contract with Horizon and gave his two weeks notice. He was very excited about his new opportunity.

Upon joining Horizon, he noticed that they weren't too well organized. He figured this was due to them being a new, start-up company. He chalked it up to them having too much work and not enough people to get the work done — a good problem to have — or so he thought.

In the middle of the first week of work, Bob left for Minneapolis for a financial meeting with John at company headquarters. Bob left Randy in charge of the development group in his absence. During this initial week, Randy had a couple conversations with corporate clients who were disgruntled and unhappy with development efforts on their current projects. He listened as the clients told of missed time lines, inadequate instructional design expertise, and sloppy, shoddy programming.

Late in this first week of work, John decided to pull the plug on the development branch of the company in Kansas City. He said that he could no longer afford to keep the multimedia development side of the business and that this group was no longer employed by Horizon. He called Randy and spoke frankly to him. John mentioned that he did not approve of Bob hiring Randy and that there was no money to pay for his salary. John went on to share that the company was consolidating its Minneapolis and Kansas City operations. After bitter discussions between John and Bob in Minnesota that same day, John called Randy and asked him to take over the day-to-day operations of the Kansas City branch of the company. He said that he did not trust Bob and that Bob (who was now on his way back from Minnesota) was not to be let back into the building or the business. For all intents and purposes, Bob has been fired from his job. Randy was told to pack up Bob's personal belongings and get them to him the next day.

Randy began doing some investigating into the company. He learned that the employees had not been receiving regular pay checks. Expenses for the branch have been going unpaid or in some cases have been paid by Bob. All of the talk of turning the company public and/or getting venture capital have been true. What hasn't been true are the financial documents on the solvency of the company. Randy realized that all the documents he has been shown have been projections for the future.

That same evening Bob arrived back in Kansas City and asked Randy to gather the employees together for a meeting the next morning to discuss the future of the company. Randy is in a dilemma whether to schedule the meeting or follow John's request to not allow Bob back into the company.

What would you do if you were in Randy's shoes?

1. Do you trust Bob? Why?
2. Do you trust John? Why?
3. What legal options do you have personally since information about the company may have been misrepresented to you?
4. What do you do in the face of the Kansas City branch being eliminated? Do you take care of yourself and begin looking for a new position? Or do you try to work out the continuation of the branch with John?
5. How could Randy have been so blind as to not see the negatives going on in the company before accepting the position with Horizon?

Case Number 33

Marketing the Crown Royale

by Kenneth J. Kaser, Marketing Education Coordinator, Dulles High School, Sugar Land, TX

Georgia Jones is the manager of the Crown Royale, a 300-room hotel/convention center located in a Midwestern city with a population of approximately 200,000. The hotel recently has been completely remodeled adding 100,000 extra square feet of convention space. In the renovation, the convention center was upgraded to include the latest technology. The hotel has a unique coffee shop and four-star restaurants. The downtown location of the hotel has ample parking available with a parking garage for hotel guests. Currently, three major airlines fly into the city where the Crown Royale is located. This growing city is known for the warm hospitality of its people and an increasing number of opportunities for social activities, including a children's zoo, a center for the performing arts, and a unique historic market area that is open from May through September. A definite plus for the Crown Royale is the city's extremely low crime rate.

Currently, the nearest convention center to the Crown Royale is the Marriott, located 50 miles from the Crown Royale. The Marriott is located in a city with a population of approximately 350,000 and has an airport with five major airlines. The Marriott convention center enjoys a large percentage of the convention business for the area. The city in which the Marriott is located has many social activities, including a popular zoo, a center for the performing arts, and a minor league baseball team. However, the city has recently been experiencing a major increase in the crime rate. The hotel is located close to the areas in which the majority of the crimes take place.

Georgia faces the challenge of marketing a hotel/convention center located in a climate with cold, snowy winters; rainy springs; and hot, humid summers. She must determine the pricing structure for hotel and convention space for groups that wish to hold their conventions at the Crown Royale, and she must design a winning team of managers to make the hotel/convention center a success. She knows she must compete with the other convention center and offer convention planners a reason to choose the Crown Royale instead of the Marriott.

1. Who are the key actors in this case?
2. What are the major issues in this case?
3. What qualities do you feel Georgia should be looking for in the managers she chooses for the successful team? Where should she acquire names of prospective candidates?
4. What are the roadblocks that must be overcome by Georgia?
5. What markets will Georgia be addressing?
6. What do you think would be the most effective means of marketing this convention center? Why?
7. On which convention center highlights should the marketing program focus?
8. What methods do you believe Georgia should use to contact prospective groups throughout the U.S. to inform them of the Crown Royale?

Case Number 34

Techsystems

by Craig A. Agneberg, President, Blue Sky Interactive

Chad Behrend's previous work experience was as a computer programmer, high school computer science instructor, and most recently as a developmental editor for a computer science textbook publisher. The publishing company had recently downsized and Chad had been laid off. Now, after being unemployed for almost six months, Chad took a temporary part-time position with TechSystems as a PC Support Analyst. This temporary position was to provide PC and Mac support to end users at a Fortune 500 company. Chad performed very well at this position and received accolades from many of his end-user clients.

After completing this assignment, Chad went back on unemployment and continued to seek a job. Within a couple of weeks, Paul Kessler, President of TechSystems called Chad and offered him a position as Manager for PC Support. In this proposed position, Chad would be supervising ten or more PC support employees as well as selling TechSystems services to other companies. After some discussions with Paul about the salary and responsibilities of the position, Chad accepted the offer. One of the conditions of acceptance was that Chad would have a performance and salary review after successfully completing three months on the job.

TechSystems had spun off a subsidiary whose function was to bid on and then provide computer services to government locations. At this time Windows 3.0 was being launched as a new user interface that would make PCs as easy to use as Macintosh computers. Paul had a dream to develop a front-end interface to Windows that simulated a real office desk environment. The interface would have a desk with file drawers, where folders within the drawers could be opened and computer documents could then be dragged-and-dropped into folders. It would have a desktop that provided e-mail access, a calculator, etc. It would have a bookshelf above the desk for launching the major applications on the end user's computer system. And all of this would be customizable by the end user. Paul asked Chad to lead the development of the product and Chad enthusiastically took on managing the product development. With these new responsibilities, Chad was now directly supervising 15 employees.

So Chad was now leading this new software development while continuing to manage the PC support consultants. He was busier than ever and enjoying the work immensely. Four months had passed when Chad remembered that he had not had his performance and salary review at his three-month anniversary. Chad sent a memo to Paul asking for the evaluation and review. There was no response from Paul to his memo request. Chad waited a week and then wrote another, stronger-worded memo to Paul asking for his review. By now, he was almost five months into his new position. Paul responded to the memo by setting up a review meeting with Chad in three weeks. This was acceptable to Chad especially because of the workload and schedules over the next few weeks.

Paul asked Chad to complete a listing of accomplishments for the 4-5 month period of employment and his goals for the rest of the year. Chad completed the task and sent them to Paul in preparation for the meeting. The day of the meeting came and Chad received a phone call from Paul saying that he would not be able to meet today for the salary review meeting and could he reschedule. Chad agreed to a new meeting time for the following week. The next meeting time came and Paul again was unable to meet. Paul then suggested that they set up a six-month review time since it was coming up to six months. Chad agreed and a new meeting date was set. That meeting time came and went again with Paul again too busy to meet.

When the six-month meeting fell through, Chad became very frustrated. He began talking with other managers who were currently with the company and some of those who had joined the company and then left after about a year. Many of the people he talked with who left had been working in the government systems group. Some excellent employees with good job skills and work experience were leaving or had left the company. After visiting with a couple of the people who had left, Chad came to the realization that he would probably never have a salary review meeting with Paul and that there would not be any increases in salary while he was employed with TechSystems.

What would you do in this situation?

1. What would you do if you were in Chad's shoes?
2. Would you begin looking for a new job?
3. Would you quit this position based upon the principle of Paul promising you a review?
4. Would you confront Paul and demand a review meeting?
5. Would you threaten to quit if you didn't get a review meeting?
6. Would you search out legal options at this point?
7. How could you bear to continue to work for Paul and continue to do an excellent job knowing that you wouldn't get any salary increase for your hard work?
8. Why do you think this happened to Chad?

Case Number 35

Promoting a New Business—Direct Mail Marketing

by Roger L. Luft, Professor, Business Education, Eastern Illinois University

Rick Lane decided to pursue a long-time interest in photography as a part-time career opportunity. Rick worked in another job and received an income that was considered quite substantial for the area in which he lived. He lived in a town of about 20,000 people, which already had five photographic studios. Rick's primary interest was in nature photography. He had built up a good collection of photographs, mostly slides, which he tried to market directly for use in magazines and textbooks. He was also represented by a photo agency that tried to sell his work.

Selling photography for use in magazines and books is a process that takes a long time and is a game of numbers...that means, the photographer must have a lot of photographs to select from and will be competing against numerous other photographers with similar work. Rick's income from his full-time job was supporting his nature photography and the purchase of new equipment. His projections indicated he needed to generate income from his photography business before his sales to magazines and books would begin. One option was to begin taking portraits of people, although Rick didn't want to photograph weddings.

Rick investigated what he needed to take the step onto portraiture and found that to be competitive he had to have studio lighting and props, plus a camera that was more oriented to studio photography. He made the purchase and soon developed the skills needed to feel comfortable in promoting his portraiture business. He didn't have a studio, but had the equipment capable of being transported on location, or he could set up a studio in his home by using the living room. He preferred to specialize in location photography.

It was the time of the year when photographic services should be promoted to students who needed to have senior class photographs. Rick knew this could be a very lucrative market since he had a daughter who just a few years earlier had her pictures taken. Rick had established a price sheet for several different portrait packages and for individual pictures. He was preparing a letter using his letterhead and was about to stuff envelopes for about 200 seniors to be. Rick's wife and youngest daughter were supportive and were assisting with the mailing.

At that point Rick's wife, Jean, suggested that he include a price sheet with each letter. Rick wasn't planning to include prices, thinking that if anyone were interested in using his services they would call for a price sheet. He thought he could save money by not printing 200 price sheets and only sending prices to those who requested them. Beth was very insistent that as a mother one of the first things she would want to know was the prices so they could be compared with other photographers. Rick knew that other photographers in town did not send out prices with their promotions, however, some photographers from nearby towns did. Rick's youngest daughter, who was also going to be a senior, felt that price sheets wouldn't be necessary.

Rick was a little unsure of how he should approach the situation. He knew he had to satisfy parents, but his letters were going to the students. His photography services were new in town, he didn't have a studio other than his living room, but he knew many of the students who would be seniors because he had photographed some of the sports teams. He didn't have a well-established portfolio to show prospective clients, but in addition to team photographs he did have some portraits that he had been taking in order to learn his new equipment. He felt he could provide quality in his work and he knew that his prices were extremely competitive. He wanted to have some business, but he didn't want so much that he couldn't handle it and still effectively do his full-time job.

1. Is direct mail marketing the best approach for Rick to use in his young business?
2. How should he conduct a direct mail marketing campaign in order to accomplish what he wants to accomplish?
3. How important is it that Rick include prices with his direct mail letter?
4. What types of promotional pieces (advertising) should Rick be developing if he wants to be successful in promoting his photography business?
5. How do potential clients feel about selecting a local photographer who does not have an established reputation?
6. What other methods should Rick use to promote his photography business? Would it be more advantageous if Rick had a studio, or is it a good promotional feature to specialize in location photography?

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Case Number 36

Reaching New Heights

by Rosemary McCauley, Professor, Department of Information and Decision Sciences, Montclair State University, Upper Montclair, New Jersey

Jim worked for the federal government for fourteen years. He was a mechanical engineer who had a positive career path in the Department of Transportation. In his spare time, Jim enjoyed working with tools and was a good a carpenter. His hobby was building customized tree houses and soon his talents were in demand by neighbors as well as other customers. His hobby had almost developed into a part-time job. He was, however, concerned with the logistics of his promising avocation. To simplify his transportation needs, he was able to have the lumber delivered directly to the job site. However, it was a nuisance to transport his ladder, a vital tool, in his car. He wasn't ready to invest in a van or a truck so he was seeking an alternative—a lightweight, portable ladder that fit in his sports car.

He thought about the situation and began applying himself in the design of a prototype ladder to meet his needs. He was consumed with this notion and after working at the challenge for more than a year, he believed he had designed a ladder with the desirable specifications that he sought: lightweight (25 lbs.), compact (folded to 3 feet) yet telescopic (opened to 15 feet) and sturdy enough to hold 250 lbs. of body weight. He believed that his invention would not only be helpful to him but would also have marketing potential for commercial as well as home use.

Jim designed and constructed the ladder in his spare time at home, using his own materials. When the ladder was finally built and adjusted to meet his specifications, Jim found that it met his expectations. Now that he was successful with his new ladder, he had a number of concerns. Let's help Jim take a look at some of the issues he faces. What should he do in the following situations?

1. Should Jim attempt to get a patent and market the ladder?
2. What might be Jim's concerns in applying for a patent?
3. As an engineer, would you recommend that Jim try to bring the product to market on his own or should he attempt to sell his idea to an organization already in the business of selling similar products?
4. How would Jim find out possible manufacturers and potential distribution channels for his invention?
5. What should Jim do to raise capital if he decided to pursue the venture on his own?
6. How can Jim get help in preparing the business plan that will be necessary in order to raise capital?
7. How does Jim go about guaranteeing the safety concerns (ability to hold a specified weight) of his invention by acquiring industry standard validation of that safety?

Case Number 37

The Case of Maximum Earning

by Karen C. Kaser, Assistant Professor, University of Houston-Downtown

Mary Gallegos is a senior at Rose High School. She has always been a top student with a creative mind. Among the skills that Mary has developed are outstanding culinary skills. Gourmet cookies, breads, and pies are her specialties. Mary has an agreement with two local supermarkets to provide a given quantity of baked goods to the stores on Mondays, Wednesdays, and Saturdays. Saturdays never present a problem because Mary has time on Friday night to bake the goods. Meeting the deadlines for Mondays and Wednesdays are not as easy. Mary wants to maintain her high GPA so she can earn scholarships to the finest culinary arts schools. She also wants to provide the supermarkets with exceptional quality baked goods. The supermarkets are very pleased with Mary's work.

Lately, individual customers have been calling Mary to bake items for receptions and other special occasions. Mary likes the individual orders because she makes a greater percentage of profit on each. Time, however, is a scarce resource; and Mary is quickly finding out that one person cannot do it all. Mary's successful business has taken a definite toll on her social life also. She no longer goes out on dates and she finds it increasingly difficult to relax. However, Mary's savings account has prospered.

Graduation is only three months away, and Mary knows that the baking orders for all the graduation parties will begin to increase. She is pleased that she will make a great deal of money on all the graduation orders, but she would like to have her own graduation party. She also is considering selling her baked goods at the Farmers Market during the summer months, which could be very profitable, and knows that numerous other entertainment events which occur during the summer could provide more business for her.

Mary is confused as to what she should do.

1. Who are the actors in this case?
2. What is the entrepreneurial activity?
3. What are the "opportunity costs" for the entrepreneur in this case?
4. What are possible alternatives to enable Mary to complete school successfully and continue the business?
5. What options might Mary consider to manage the prices of her baked items? Why?
6. If you were Mary, what would you do in this situation? Why?

Case Number 38

The Case of Following The Leader

by Heidi Perreault, Computer Information Systems Department, Southwest Missouri State University

Beth reflected on the changes that had taken place during the last year at Information Associates and wondered aloud to Jeff if life would ever be same. It was late Friday afternoon and Beth had just been told to adjust her attitude and "get with the program" by David, her immediate supervisor. Never had anyone spoken to her like that and never had she received anything but glowing evaluations for her work and her cooperative attitude. Beth was both angry and bewildered. Jeff agreed that life was indeed very different now that Abby was no longer in charge. He suggested they call Abby to find out what she thought Beth should do.

Beth and Jeff had been members of a team that examined new technology. Basically, their job was to try new "stuff" and to determine how Information Associates could use the technology to serve their clients. The team leader was Abby. Abby took the team's requests for technology and software to upper management. Her main responsibility was to keep the team focused and to provide upper management with evaluations of new technologies. Information Associates was known for its use of "cutting edge" technology. Abby had a budget but she often requested additional funds to allow the team to visit sites using the technology and/or to buy additional hardware. Those requests typically were granted.

Abby encouraged creative thinking, open communications, and developed a system by which each member could set his or her own work hours. The team felt they were productive, and Abby told them upper management was very pleased with their work. Everyone on the team assumed Abby would soon be promoted to upper management. Instead the company reorganized, and Abby was assigned to her original position as a customer service representative. Abby considered this a demotion and was very unhappy. She shared her frustrations often with Beth and Jeff. Her feeling was that she was being too successful and that others in management were threatened by her success. Beth and Jeff felt Abby's suspicions were true because their team was the only group within the company to have had such a wide degree of autonomy.

Beth and Jeff were moved to the Training Department. When the reassignments were first announced, Abby visited with David, the manager of the Training Department, to tell him about the type of work Beth and Jeff had been doing. After the meeting, she met Beth and Jeff for lunch. She told them that David was willing to allow them to continue to evaluate technologies as part of their duties. She encouraged them to continue the work of the team and to keep technology evaluation as at least 50 percent of their duties.

Both Beth and Jeff talked with Abby almost daily. The conversation usually included how much they missed being with the "team" and that they disliked the Training Department's rigid structure. They also talked with other members of the Training Department telling them David was a poor manager. As examples they explained how Abby had worked with each team member to develop a schedule for the month. David simply left their assignments in folders. Abby had encouraged flexible schedules, but David expected them in the office by 8:30 each morning. Abby made sure they communicated on all issues frequently and openly, but David avoided calling meetings because they wasted time. Many of the complaints were related to David by members of the Department who thought Beth and Jeff were trying to create trouble.

Today Beth told Abby that David was not giving her the flexibility she needed to continue her evaluation of new technologies. Abby encouraged Beth to stand up to David and to make him honor his word. Beth agreed that she could not allow David to destroy what their team had created. She would insist that she be given time and recognition for her evaluations. Beth had taken the initiative to contact an international manufacturer of technology to evaluate its latest product. The Model 6XCL was delivered earlier in the week, and Beth could hardly wait to begin evaluating its capabilities. Jeff had cautioned her about signing for the equipment without David's approval, but Beth insisted that she had the authority to request equipment on a loan basis. The equipment was being loaned to them for a three-week evaluation period. The only cost would be the delivery and pick up of the equipment.

David knew that both Beth and Jeff were not satisfied with the reorganization, but he was especially exasperated with Beth. She refused to follow standard operating procedures and often was openly rude to him. For example, earlier this week she just stopped at his office without an appointment and starting telling him his management style was outdated. Once again he

found himself listening to how Abby had coordinated the "team." David was tired of hearing about how great the "team" had been. In his opinion the team concept had been tried, and it had not been successful. The team did not stay within budget and there was no accountability. Abby had insisted on certain liberties for the team and had shown no respect for upper management decisions. Abby ignored decisions and refused to see others' views. David was sure that it was no mistake that Abby was no longer in a decision-making role. David felt Beth was making some of the same mistakes that Abby had made.

David was considering his options in regard to Beth. She did not seem to be willing to adjust to the new situation. David was very disturbed that Beth had signed for a delivery of equipment. He had not been involved in the request and he was unsure how to handle the bill for the delivery charge. It was not a substantial amount, but the point was that Beth did not have the authority to order or to sign for equipment. Just as he was pondering what to do about the unauthorized signing for equipment, Beth entered his office to argue about her current assignment. She said she was refusing the assignment because it interfered with her commitment to "evaluate the Model 6XCL." When he asked who had assigned her the duty of evaluating the Model 6XCL, Beth told him that because there was no longer any leadership (Abby again) associated with examining new technology, she had assigned the evaluation to herself. David told her to "un-assign" it and get back to what she was being paid to do. Beth then exploded and called David a liar. Beth seemed to think that he had made some agreement whereby Beth would evaluate technologies as 50 percent of her assignment. When he tried to clarify his position, Beth kept interrupting him. Finally, David told her to come back on Monday and let him know if she was ready to "get with the program".

1. What are the major issues of the case?
2. What do you think about Beth consulting Abby for advice?
3. What do you think Beth will tell David on Monday?
4. What differences in leadership styles do you see between David and Abby? Which leadership style do you think would be best to use during and after the organization? Why?
5. If you were David, how would you have handled the reorganization?
6. How do you think Abby should have been treated during and after the reorganization?
7. What could David have done when Beth and Jeff received their new assignments?
8. Who do you think needs to make an attitude adjustment? Provide your rationale.

Case Number 39

Will The Entrepreneurial Spirit Continue?

by Kurk Shrader, Business Teacher, Elmwood-Murdock High School, Nebraska

Alfred and Sophia Romero were enjoying their twentieth year of business at Romero's, a small Italian restaurant located in a metropolitan city on the East Coast. The restaurant was located in Autumn Leaf Shopping Mall and had expanded on two occasions. Romero's had realized a profit each year of its existence; in fact, it most recently realized its largest net income.

Alfred and Sophia, both 56 years of age, took great pride in their small business; after all, they had developed the thriving business from the ground up. Neither had more than a high school education, but both had tremendous work ethic; in fact, they contributed well over 40 hours per week to their business. In the beginning, Sophia was skeptical about starting a business but her family's rave reviews over her delicious cooking and specialty breads convinced her to give Romero's a chance. Initially, Alfred and Sophia virtually ran the business on their own. Since that time, they have expanded and currently hire between 10-15 full and part-time employees, many of them friends and family.

Romero's clientele are mainly middle-class "executive types" who enjoy the noon specialties during their lunch break from the local business district. There has, however, been an increase in "shoppers" who dine at Romero's in spite of numerous other fast food establishments located in the mall. The evening crowd (although light compared to the noon crowd) is composed of some shoppers but mainly middle-aged couples.

The menu includes primarily Italian entrees; few "American" meals are on the menu. The food is considered excellent; and the atmosphere, charming. The prices are modest, but the servings are ample. With a few exceptions, the menu has remained unchanged from the initial menu of 20 years ago.

The Romeros have only one child, a son named Carl. Carl is currently a senior at the local university and is about to graduate with a degree in Business Administration. While in school (high school and college), Carl worked at the restaurant. He was intrigued with his parents' skills in food service, but his real interest was in the restaurant "business." Although it was always assumed by Carl and his parents that Carl would join his parents in the operation of the family business upon his graduation, both parties had apprehension. Sophia and Alfred wondered how Romero's could earn enough income to support Carl and his future family, and Carl worried about pursuing a future in restaurant management. Would his parents let him make decisions? Would he rather put his business skills to work in a different setting? In spite of some concerns, both Carl and his parents looked forward to the continuation of the family business.

Recent notification from Autumn Leaf Shopping Mall informed the Romeros of plans to remodel the shopping mall. The construction was scheduled to begin in six months which corresponds with the end of the Romero's lease with the mall. Executives from the company indicated a desire to keep the Romeros as tenants, but they indicated that the rent would be significantly higher with considerably less space. Remodeling would take an additional six months.

The Romeros are confused as to what to do and contemplate many questions. Both will be within five years of retiring once the construction work is complete. Should they remain open? What do they do during the six months of construction? What about Carl? If they quit the restaurant business, what career options are available to them at their age? Should they relocate? If they do relocate, what marketing strategies should they employ? Should the business maintain its name, menu choices, and overall Italian flavor?

1. What are the Romeros options? What are the advantages and disadvantages for each option?
2. What involvement should Carl have in helping his parents make a decision? Do their options change if Carl decides not to be involved in the restaurant business?
3. Suggest other options the Romeros could have chosen to avoid having to make these difficult decisions?
4. What other questions should the Romeros be asking themselves and others before making a decision?

5. If they reopen, what new (if any) marketing strategies should they employ? Consider the following:
   A. Market Target
   B. Business Name
   C. Menu Choices
   D. Pricing Strategies
   E. Location
   F. Promotional Strategies
6. Describe Carl's role in the business once they open at a new or in the existing location.

Case Number 40

An Interpretation Everyone Can Understand

by Sharon Lund-O'Neil, Office of the Provost, University of Houston

Henry Williams works for a major ironwork corporation, BJT Industries. Henry started at BJT over 20 years ago and currently is the company's budget analyst. Henry has seen a lot of change in the corporation over the years. Senior administrators have come and gone; and he has assisted at least three totally different management teams. Each of the management teams had new ideas when they became major players at BJT Industries.

The newest management team has been in place for about eight months. As he did with two previous teams, Henry is assisting them with understanding many of the fiscal aspects of BJT. Henry has found working with the present management team, however, extremely difficult. The major problem he sees is consistency between what is said and what is done.

In the last several weeks, Henry has seldom found a single day when he doesn't run into something that presents a conflict. The new marketing plan is one example. The marketing plan is a solid document that provides several levels of incentives and rewards for the marketing group to achieve higher levels of sales for the company. Henry prepared all the financials for the plan and was optimistic about how Katy Silverton, senior vice president of marketing, would lead the company to new profit highs. Katy took a keen interest in the reports Henry developed. She asked good questions that helped Henry in interpreting company data for her to use. But in last week's meeting of executives, Henry was quite disturbed when Katy "refocused" some of the data and seemed to purposely mislead the management team. In the meeting Henry asked for some clarification in an attempt to have her correct her position without embarrassment. However, she restated her position and thanked Henry for providing the data for her innovative marketing scheme. Henry is now concerned that a distortion of the facts will lead to some marketing claims that cannot be substantiated and result in some decisions that would not be in the best interests of the company.

After the meeting Henry talked to Katy about her statements. She told Henry that the "hard facts" must be interpreted in a "softer way" for the executives to understand. While she was quite convincing, Henry feels she has "crossed the line" for him to trust her judgment. He is even more concerned because she has the confidence of the management team and has built a very upbeat marketing group that is very supportive of her.

1. Is integrity an issue in this case? If it is, identify potential integrity problems.
2. How is it that Henry and Katy could have such different opinions? Who is right? Why?
3. What are Henry's options regarding his discomfort with Katy's actions?
4. If false claims are made publicly without discovery or jeopardy to BJT's customers, should Henry tolerate the situation quietly? Why or why not?
5. If Henry becomes a "whistle blower," what repercussions might be ahead of him?
6. Put yourself in Henry's place and determine what "crossing the line" means for you.

Case Number 41

The Case of the Curious Partner

by Donna L. McAlister-Kizzier, Associate Professor, University of Nebraska-Lincoln

Ten months ago, Joe began his new position as information technology director at Innovative Electronic Publishing (IEP). Although still "learning the ropes," Joe feels qualified for his position. Just one year ago, Joe completed a bachelor's degree in End-User Information Systems at a local university; while earning his degree, he worked as a supervisor of information systems for a large local insurance company. Joe's major responsibilities at IEP are to maintain the corporate information system and to provide information support for administrative personnel.

Joe has enjoyed the excitement of being involved in the formative stages of a promising new business. The owners have been building IEP successfully on a part-time basis during the last five years. One year ago, Jody and Rebecca, the owners, quit full-time positions at other organizations to focus their energy on IEP. IEP has a current clientele of 900. Jody and Rebecca are hard working, committed to the success of IEP and have hired competent support personnel and an aggressive management and sales team.

Jody, who handles the business details of the business, has worked closely with Joe in defining his job responsibilities. His first major responsibility was to oversee successful implementation of a local area network to support the administrative needs of the administrative work force. With a support staff of one technical trainer and one technician, Joe was responsible for designing and providing ongoing training and support for the staff of twenty-five personnel employed in the IEP offices. Joe takes pride in the state-of-the-art information systems installed at IEP. Formal feedback indicates a high level of satisfaction with information systems services. In addition to providing an array of administrative support tools, IEP uses a world-wide electronic mail system for corporate communications, with web server maintained at IEP.

Joe's new job was going so well during his first ten months on the job that he felt as if his bubble was destined to burst any day. Although he had experienced the usual installation glitches, installation and training were on schedule and partners were pleased with the information system and the support Joe and his staff designed. Early one morning, Jody walked into Joe's office, closing the door behind her.

"Joe, I need your help. But, first of all, I want you to understand that this conversation is to be held in the strictest confidence."

"Of course. What can I do for you, Jody."

"No one at IEP understands technology better than you, Joe. First, I have a technical question for you."

"I'll do my best to help you, Jody."

"Can you access all of IEP's electronic mail files?"

"Yes I can...however, other than routine maintenance, I do not access the E-mail files."

"Is it possible to access E-mail files that have been deleted?"

"Yes...but, it depends on how old the files are, when they were deleted..."

"Joe, I don't need to know the criteria for accessing deleted files, I just need you to access some of IEP's E-mail files for me."

"Jody, are these files in your E-mail account that were accidentally deleted?"
"No...they are someone else's files. Joe, I would like a complete printout of all of Larry Mitchell's E-mail files...later, I may request files of other key personnel. I'll let you know."

"I see...I'm a little puzzled by your request. Does Larry know you are accessing his files?"

"No...and Joe, I don't want him to know. This is confidential—do you understand? You do not need to know the reason for my request, but I understand your curiosity. Suffice it to say that I need to review his files for the strategic future of IEP. I want you to prepare a printout for me by 8 a.m. tomorrow morning, which includes all Larry's incoming and outgoing mail since he was hired. I want you to handle this task personally—do not tell anyone, including Rebecca, about this request. Complete the task discreetly...when the files are ready, call me, and I will come down personally to pick up the printout."

"Jody, have you checked with legal counsel...?"

"Joe, I have thought about the legalities of this request. The way I view this situation, the E-mail files are corporate files. As a senior partner, I can access all company information. I have sound reasons to not involve our legal counsel at this time. I also do not want you to consult Rebecca. Don't worry, Joe . . . I will stand behind you on this. Oh...one other thing...take precautions that none of Larry's files are purged until I personally give you the go ahead to do so."

With that directive, Jody walked out of Joe's office. Larry Mitchell, a brilliant and ambitious young man, is Rebecca's key managerial assistant. Joe recalled discussions of copyright law and ethical issues discussed in the information systems courses he had recently taken at a local college. Now, he was confronted with dealing with the reality of these issues. He figured the task Jody assigned to him would take about two hours. It is now 3:30 p.m.

1. Who are the key actors?
2. What are the major issues in the case?
3. What are Joe's options?
4. If you were Joe, how would you respond to Jody's request?
5. Is Jody's request legal? Explain your answer.
6. Is Jody's request ethical? Explain your answer.
7. What are the potential implications for Joe if he complies with Jody's request? If you were Joe, what steps would you take to protect yourself from potential negative consequences?
8. Why do you think Jody does not want Rebecca to know about her request?

Case Number 42

The Case of Falling Off The Career Ladder

by Heidi Perreault, Computer Information Systems Department, Southwest Missouri State University

Juanita wished Barry luck as he strode to the elevator on his way to his yearly evaluation. Barry was a quiet man with a ready smile. When Juanita joined the department three years ago, it had been Barry who had made her welcome and who had showed her "the ropes." He was the type of individual who stayed late and often ate lunch at his desk to be sure projects were finished on time. Juanita hoped Barry would be the person selected to move into the supervisory position, which was open. It would be a promotion for Barry and give him a much deserved pay increase.

An hour later Barry returned. He made light of the evaluation and said he had nothing exciting to report. Juanita knew that meant he had not been given the promotion. She could not help but wonder who would move into the supervisory position. She hoped it would not be Judy Milton, but Judy had the most seniority. Judy was one of those people who found it difficult to give a compliment but easy to find something to criticize. She was a fine person but she rarely smiled and had a controlling personality. Judy was professional, competent, ethical and consistent. However, everything had to be done her way or it was wrong. Judy liked to be in charge and whenever she was the head of a committee, she made it known that she expected a total commitment. What she meant by total commitment was that everyone on the committee was to do whatever Judy wanted in exactly the fashion Judy stated.

Juanita and Barry shared a quick lunch the next day and talked about the open position. Juanita shared her disappointment that Barry had not been awarded the position and that she hoped Judy would not be selected. Others at the table overheard, and they also told Barry how sorry they were he was not selected. To lighten the mood Juanita started mimicking Judy. It was actually an old joke started over a year ago by a co-worker who swore that Judy insisted he eat his sandwich before getting his coffee and dessert. With each telling, the story got more and more exaggerated. Juanita was very good at mimicking Judy's voice. She soon had people laughing as she pretended to be Judy and began giving orders to others at the table on how to eat their lunch.

As they walked back to the office after lunch, Barry admitted he was disappointed that he had not been offered the position. However, he thought Judy would do a good job as supervisor. As he put it, Judy had "paid her dues." Juanita reluctantly agreed that Judy would do a fine job. She already missed Lowell Tomkins who had retired from the position after 26 years with the company. He was a man of great energy and enthusiasm. If there was a problem, Lowell would find a solution. Whenever Lowell was out of the office, it was Judy who took over the duties. Reluctantly Juanita agreed that if Lowell trusted Judy, she should also.

Early the following morning Judy stormed into the office. She went straight to Juanita's desk and accused Juanita of telling lies about her. Juanita was stunned by the outburst. Judy said that as soon as her promotion came through, she was firing Juanita. Barry came to Juanita's defense, but Judy was too angry to listen. She got back on the elevator and left. Juanita was shaken. She believed what Judy said and decided to start looking for a new job immediately.

Early the next week, the announcement on who was to fill the opening was made. It was Marilyn Waits from Accounting, an individual who had as much seniority as Judy. Department members knew little about Marilyn's capabilities. Members of the department grouped around the break table to discuss the decision. As they voiced their surprise, Karen from personnel came in to get some coffee. Karen was asked about the decision. She hesitated but, with some prodding, told the story. It seems that both Judy and Marilyn were being considered for the promotion. After the first vote, Judy was slightly favored, but one member of the promotion committee was concerned about Judy's lack of a sense of humor. He decided to ask Judy how she planned to handle insubordination and gave her the example of the "how to eat your lunch" joke. Most of the committee had assumed she would either be embarrassed or find the story funny. Instead, Judy became very agitated. She demanded to know who had said such a thing. Karen did not think that Juanita's name was ever mentioned, but it was common knowledge that Juanita often mimicked Judy. When the committee learned that Judy had threatened Juanita, the decision was made. Judy was not capable of handling a supervisory position. Marilyn Waits was given the position.

Karen left after swearing them all to secrecy. Juanita told the group she felt responsible for Judy not getting the promotion and she did not know what she should do. Barry told her to stop worrying about it. In his opinion Judy had her opportunity but lost it by overreacting. Others in the group agreed, but all who had participated in the joke were uncomfortable.

Although Juanita liked her job, she decided she would resign. The thought of working with Judy was just too unsettling. Marilyn understood and gave her a strong recommendation.

1. Do you think it was justified to deny Judy the promotion because of her reaction to the joke? Discuss.
2. What do you think Barry meant by Judy having "paid her dues." Discuss the merits of "paying one's dues" as a criterion for promotion.
3. Should any action have been taken regarding Juanita's mimicking of Judy? Why or why not?
4. Do you think it was best that Juanita left the company? Did she deserve a strong recommendation? Provide rationale for your answers to these questions.
5. Discuss the integrity of a member of the promotion committee using the "how to eat your lunch" joke to illicit a response from Judy regarding her lack of a sense of humor.
6. Discuss the integrity of Karen sharing the reason for the personnel committee selecting Marilyn.

Case Number 43

The Case of Wrong Pricing

by Roger L. Luft, Professor, Business Education, Eastern Illinois University

Jeff Hansen considered himself an honest individual, but a wise shopper. He recently acquired a new computer and laser printer. The one thing he forgot to order was a new cable to connect the printer to the computer. Because the laser printer required two-way communication with the computer, the old cable from the dot matrix printer would not work. The computer and printer were purchased from an out-of-town firm and Jeff knew that if he ordered the cable from them it would be about a week or longer before he would be able to use the printer with the computer.

Jeff began shopping in his hometown and at a discount chain store found a two-way computer cable that met the recommended national standards. It was on the shelf and marked $5.96. Jeff didn't realize that the cable would be so reasonably priced so he took it to the checkout counter to make the purchase. When the associate scanned the cable it rang up at $15.96. Jeff questioned the associate about the price and told her the shelf from which it came was marked at $5.96. The associate called a supervisor who checked the item on a computer print-out and said it should have been $19.96. Since Jeff had been told three different prices, he politely told the associate that he would be back when they determined the correct selling price.

Jeff went back to the same store several times during the next week and found the cables on the shelf at the same price of $5.96. Since he was on his way to another nearby town one day he thought it best to check prices at several other stores because there were more from which to choose. He looked in several stores including those that specialized in electronic items. He found that the lowest priced cable he could find was around $36 in all the specialty stores.

When Jeff arrived back home he stopped at the local discount store and the cables were still priced at $5.96 and only two were left. Jeff felt that even at $15.96 or $19.96, he was getting a bargain and was prepared to pay those prices. He took both cables to the checkout counter in the electronics department and they scanned at $15.96. Jeff calmly pointed out to the associate that the price on the shelf was $5.96...the associate looked at the price on the shelf to verify that Jeff was telling the truth and sold him the cables for $5.96.

1. Was Jeff wrong in purchasing the cables for $5.96 when he knew that most places charged about $36 for them?
2. Is it the store's fault that they weren't getting the price they should have for the cables?
3. Jeff gave the store an opportunity to correct their mistake and find the actual price of the cable after his first visit. Why wouldn't the store make the correction?
4. During the first visit, what rights did Jeff have to demand the store sell the cables for the price that was marked on the shelf?
5. Was Jeff being honest throughout his dealings with the store? What would you do?

Case Number 44

The Missing Keys and Passwords

by Janice Schoen Henry, Associate Professor and Chair, Department of Information Management Systems, College of Applied Sciences and Arts, Southern Illinois University, Carbondale

Gabe started his new job with high expectations. After 3 ½ years of working full-time and going to college, all to earn his Bachelor's Degree in Computer Systems, he had been offered the new job of Computer Network Technician in the department of the college where he had earned his degree. The department was in the process of reorganizing, and several new jobs had opened for technical-level persons to take over work that had been done by faculty on an extra-duty basis.

The Department Chairperson, Dr. Smith, felt that instructors should teach and that technicians should do technical work. Dr. Smith had to get one of the teachers out of the business of running the computer network and put that job into the hands of someone who would support the mission of the department.

The department's computer network had grown from a small, self-contained computer lab into a system made up of a master server, two computer labs for students, and a computer on the desk of each of the department's 33 professional and support staff members. In addition, the system was linked to the Internet and to the university's main network. The system was used not only for instruction; but, it was also used for conducting the business of the department and interfacing with the university's business system, as well as for conducting research at the university and over the Internet.

The teacher in question, Mr. Richards, was causing all sorts of problems. He had been the first instructor in the department to begin teaching computers and had, therefore, taken responsibility for installing the original computer lab in one of the classrooms. This responsibility just naturally increased as the need for a bigger computer system grew. Now, with the large, interconnected system, Mr. Richard found himself in charge of the very backbone of the department. Nothing could get done without computer support, and he controlled it all.

Mr. Richard made sure that everyone depended on him for access and operation of the growing system. He used a series of passwords to open the various parts of the system each day, and he personally kept the keys to the server so that no one could get into the system and change the control configuration. Mr. Richard gloried in this control. And, the more control he gained, the worse his attitude became regarding helping others use the system.

As the college grew, the computer labs were used more and more—now extending well into the evenings. Also, one of the labs was supposed to be available every evening and weekend days for students to use on an individual basis to complete homework assignments. Yet, every time there was a problem with the system or a new access was needed during these extra hours, Mr. Richard had to be called to come provide assistance. He griped about not having any time for his personal life, although he never missed billing the department for the extra time he had to work. Frankly, the cost was getting too high. And, lately, he could not be found on a couple of evenings to connect the system to the Internet, causing two different classes to totally lose their lab time needed to complete homework assignments. And, in fact, one of these classes was Mr. Richard's.

This is the situation that Gabe came into when he started to work. The department, which had evolved from little groupings scattered all over the campus, was being relocated all into one building, requiring that the network, one of the labs, and server be moved and reinstalled. If this wasn't trouble enough when he was hired, Gabe was told by Dr. Smith that he could expect some problems from Mr. Richard, and ending with: "I want you to know that I'll support you 100 percent." Gabe appreciated Dr. Smith's offer of support because Mr. Richard had taught several of Gabe's major courses, and Gabe was aware of how difficult things could get with him when he became unhappy.

Gabe told himself that first, however, he would try to work out any problems himself. He would call on Dr. Smith, who always appeared to be very busy, as a last resort. "If I can get the system relocated and work around Mr. Richard, Dr. Smith will really be impressed" Gabe thought. " It would be a good way to get established here at the college."

Mr. Richard really hit the ceiling when he was told about the change in responsibility, and that one of his former students would actually replace him in managing the system. He viewed it as a demotion, threatening to call a grievance until Dr. Smith convinced him that he had no case. He stormed out of the office.

"I wish you luck with the change. That kid is going to have some major problems getting the system back up after the equipment is moved. You wait and see!"

Moving and physically reinstalling the equipment and wiring was problem enough. The work had to be done during the two-week break after the end of the spring semester in order for the labs to be ready for the summer session. Gabe worked long hours, and with three working days left before summer session, had all the equipment moved and, hopefully, properly installed. He couldn't be sure because he had not yet figured out how to get into the operating system and check out all the applications. Mr. Richard had conveniently gone on vacation, leaving locator information as required, but the staff was unable to reach him. Before Mr. Richard departed, Gabe asked him for the keys to the server and the passwords. He said that the keys were at home, but that he'd get them along with the passwords to Gabe the next morning before he left on vacation. Naturally, Mr. Richard didn't show up the next morning.

Gabe kept hacking with Mr. Richard's system commands, trying to get into the network. The office staff, most of whom worked on through the break, were really on his case. They wanted to get back into their word processing and bookkeeping applications. But everything that Gabe tried in order to get into the system from the keyboard failed. He had to get into the server and actually change the configuration in order to access the system. Out of desperation, Gabe went to the maintenance shop, borrowed some "burglar's tools," and forced open the server. He continued to work throughout the weekend, gaining access to all the files and reconfiguring the system. But by Monday morning, when summer classes started, the job was not quite done.

Mr. Richard arrived at school early Monday morning. Gabe tracked him down and asked him for the keys to the server and for the passwords that would open the system. Mr. Richard turned toward him with a surprised look.

"What do you mean asking me for those things? I gave the keys and papers with the passwords to you before I left on vacation. And since then I've forgotten the passwords. You don't expect me to remember them over two weeks, do you? I also notice that you've forced open the server. Now that you've destroyed the locking mechanism, anybody who wants to can get into the system. I suppose that's how things are going to be around here with you in this job!"

Gabe knew he'd been had. He could install an external lock on the server, but nothing was going to help him access the system the easy way. Mr. Richard was going to lie about the keys and passwords, and it would be his word against Gabe's.

So, Gabe put up a notice assuring the concerned teachers and clerical workers that everything would be up and running on Tuesday, even if he had to work all night.

"I'm going to whip this thing, and without Mr. Richard." he thought. "Dr. Smith will know that I can handle difficult situations without having to call on him for help every time someone gets their back up. Even if Richard had brought the keys this morning, I wouldn't have gotten the system going before tomorrow morning."

1. What might Gabe have done differently to get the keys and passwords?
2. Who was responsible for Mr. Richard's taking control of the computer system?
3. What would you have done in relation to Dr. Smith if you were Gabe?
4. Could Gabe have taken on too much initiative in his desire to not bother Dr. Smith?
5. Have you come up against anybody like Mr. Richard? How do you deal with this type of person?

Case Number 45

Paying for Potholes

by Kenneth J. Kaser, Marketing Education Coordinator, Dulles High School, Sugar Land, TX

State Senator Carole Green is concerned about the future well being of roads in her sparsely populated state. Even though the state's population is so sparse, a major interstate highway that connects the eastern United States with the west runs through the state. This highway has a great deal of traffic and roads are in need of repair often. These road repairs are extremely expensive for the state. The method of collecting money to pay for these repairs is through an excise tax on gasoline bought in the state.

Carlos, a lawyer who does little traveling across the state, is in favor of the excise tax on gasoline because he feels this method is more equitable since all people who use the roads pay for the repairs when they purchase gasoline. He believes the excise tax places the responsibility of repairs on individuals who use the roads. Carlos has been a major contributor to Senator Green's campaign. Ron, a truck driver in the state, feels the excise tax unfairly targets the transportation industry. The gasoline tax penalizes transportation because those who transport goods by road purchase and use more gasoline.

The current practice of imposing an excise tax on gasoline is not generating enough revenue to make needed repairs to the highways. Thus, many road repairs are made slowly or are postponed indefinitely. Senator Green knows that roads that are not repaired in a timely manner are potentially unsafe for drivers. She solicits ideas from many sources, including citizens of the state. Senator Green receives many ideas from her constituents on how to generate the additional revenue needed to repair the roads.

Ron, one of her constituents, has written to her expressing his views on possible solutions. Ron has indicated that he does not want the excise tax on gasoline raised because it is already 22 cents per gallon, giving this state's gasoline the second highest price in the nation. Ron, instead, would like to see the state income tax raised, especially on higher incomes. This type of progressive tax would place more of the repair burden on the wealthy, who have more income to spare.

Carole is considering a toll road similar to one in a border state. Each time a person uses the major highway, this person must pay a toll. She has had discussions with officials from the bordering state and feels that this is a viable solution to the problem. Carole also is considering a proposal to raise the state sales tax by one percent so all purchases could contribute to the road repairs. The proposal's extra one percent would be earmarked for road repairs and could not be used for anything else.

1. Who are the key actors in this case?
2. What is the problem in this case?
3. What are alternatives to solving the problem? What are the advantages and disadvantages of each alternative?
4. Which solution should Carole choose and why?
5. To what degree should Carole consider her upcoming re-election bid when deciding upon an alternative?
6. If you were a constituent in this state, what solution would you recommend to your senator? Provide a rationale for your proposal.

Case Number 46

A Tough Career Choice for Marcy

by Sharon Lund-O'Neil, Office of the Provost, University of Houston

While attending high school, Marcy Ogden has worked part-time and summers doing clerical work for Brown and Jackson, an engineering construction firm. Marcy's computer skills have been expanded dramatically as a result of her employment. The background she received at school in basic computer skills paved the way for Brown and Jackson to give her exposure to other computer software programs. Marcy enjoys the challenges she has found at her work and feels she "owes" a lot of her opportunities to the fact she chose business classes to round out her class schedule over the past few years.

Marcy is now facing the decision of college. What college? Where? What major? Will college assure her of a good career? Would her options be just as good if she stayed at Brown and Jackson where she has had on-the-job training opportunities that she would not have been able to get in school? Marcy has so many questions that she doesn't know where to start to get answers. To complicate matters, many of her friends are not contemplating college and are looking forward to their independence after high school graduation. Her best friend, Jill Kenyon, plans to go to a large city to work. Jill wants to get her own apartment and a car, and she wants Marcy to share the fun with her—and, of course, to share the expenses. Jill already has a job promised to her at an investment firm owned by a friend of her uncle. What an exciting opportunity Jill sees in "making it on her own". Furthermore, Jill is sure Marcy could get a job there too if she wants to.

Marcy has talked with her school counselor to help her make a decision about her career choice. Her counselor, Mr. Bradford, has given her a lot of facts that point her in the direction of college. However, Marcy assumes Mr. Bradford's advice is what she would expect of a high school career counselor with a master's degree. He told Marcy that the majority of jobs now require at least some post-high school education and that trend is likely to continue. Mr. Bradford further advises Mary that many jobs will require more decision making ability because employees must be able to access the information needed for businesses to compete in a global, technological economy.

Marcy's decision is not an easy one. She knows she needs more facts to make an informed career choice and has been encouraged by Mr. Bradford to collect information about her college options, especially about computer careers. Her one visit to the local community college was not very encouraging—an advisor told her that if she would pursue a degree in office systems technology, her career options probably would be limited to a job as an executive secretary.

1. What facts and information should Marcy collect about the job market? Where should she go to get such facts? Why should she consult several sources?
2. Might it be helpful if Marcy would make a list of career options and find out what it may take for each? Why or why not? What other kinds of lists (likes, dislikes, strengths, etc.) would be helpful for Marcy to make?
3. Is it likely that Marcy has all the facts from Jill, Mr. Bradford, and the community college advisor? If not, what course of action would you recommend for Marcy to get more information?
4. If Marcy decides on college, how can she be sure she has selected the right career path?
5. Make a list of the factors that Marcy needs to consider when making her decision. Build into your list the factors (and rationale) that Marcy needs to consider to assure she will be prepared for a entering a career in two to five years and will have job mobility after that as the job market continues to change.

Case Number 47

Choice Is an Individual's Greatest Power

by Rosemary McCauley, Professor, Department of Information and Decision Sciences, Montclair State University, Upper Montclair, New Jersey

Ramona moved to New Jersey from Puerto Rico when she was three years old. She wanted to make a success of her life so she always set goals and worked diligently to meet them. She graduated from a respected technological university with a degree in chemical engineering and obtained employment with a Fortune 500 company upon graduation. In the seven years she has worked for the company, she began with jobs on the plant floor as a chemical engineer and was later promoted into the management-training program. These job changes caused her to relocate at least four times in the seven years—to Pennsylvania, Ohio, Delaware, and Texas.

Even though she was in the Management Training program with some degree of supervisory activities, Ramona was unhappy because the jobs were all in various plants which handled the production aspects of the business. Dress was casual and Ramona did not have opportunity to wear a suit or dress to work; slacks and jeans were the norm. Most of the employees she worked with were men; and since she moved from place to place so often, she had little opportunity to make friends. She felt her life was not fulfilling and longed for the opportunity to have a role in the corporate side of the organization.

In assessing her readiness to make a career move, she decided that she needed to earn an MBA. She applied to several colleges and was accepted at a prestigious Ivy League University in New England. Now that she has been accepted, she is seriously considering the advantages and disadvantages of making the move. A major concern is the cost to complete the MBA program full time will be approximately $50,000 over a two-year period. Ramona's savings total approximately $10,000. The bottom line is that she will be $40,000 in debt upon completion of the degree. Furthermore, her next work assignment requires that she move to Kansas City for at least the next 10 months. If Ramona pursues the MBA degree, her company will provide her with work in their corporate office in Philadelphia for the summer between her first and second year of study; they will not, however, contribute to the cost of her MBA study.

1. Assess Ramona's discontent with her present job situation.
2. Are there avenues within her company other than earning an MBA degree by which Ramona can achieve her goals? Discuss.
3. Are there alternatives that Ramona might consider to achieve her goal of graduate study? Discuss.
4. What are some suggestions that Ramona can pursue to minimize her indebtedness should she decide to do full-time study at the institution she selected?
5. If you were Ramona, what decision would you make?

Case Number 48

The Fast Track at City Hall

by Sharon Lund-O'Neil, Office of the Provost, University of Houston

The district attorney's (DA's) office at City Hall has a good track record of employing students in cooperative arrangements with the high school (co-op education). Other high school students, with good business skills, have found part-time work there too. Many students have also had opportunities to continue working in the DA's office in full-time positions.

Recently the DA's office expanded their training opportunities for employees. Anyone who works at least 20 hours a week will be eligible for some of these training opportunities. Most of the training sessions are two to eight hours. The topics range from business and computer skills to human relations and communications skills. Also, classes are offered at various levels in business law, politics, and government regulations.

Ken Page has spent two years in a co-op program in the DA's office. As most coop students at the DA's office have done in the past, he works 14 hours a week. Beginning this summer, there is an opening in the office for a half-time employee. The job posting indicates that the new training policy would apply to the job and that there is career advancement toward full-time employment within a short period of time. Ken plans to apply for this position.

When Ken talked with his supervisor, Ms. Youngblood, about the position, he was surprised to find that she suggested he do some homework before applying for the position. He was taken aback a little since he had worked in the DA's office for the past two years and he felt he was quite knowledgeable about the general workings of the office. Also, he knew several of the people who worked there—two or three quite well.

Ms. Youngblood suggested to Ken that he identify such things as his strengths and weaknesses, his likes and dislikes about his current job, his personal and career goals, and similar characteristics about himself. She also suggested that he talk with several other workers about their jobs, inquire about the training opportunities associated with the position, and do some research about the culture and climate of DA's office. Ken was rather perplexed as to the "culture and climate" suggestion.

He pondered her response for a few days and then asked his business teacher (who supervised his co-op experience) what Ms. Youngblood may have meant by doing some research in this area. His co-op teacher responded with more questions: Did he know how well office staff got along with each other? Were employees taking advantage of the training opportunities? What was the average length of time most employees had been employed in the DA's office? What could be said about absenteeism, communication, self-esteem, integrity, and other issues in the DA's office?

1. Add to the list of questions suggested by Ms. Youngblood that Ken should seek answers to as he considers applying for the position. Then, identify a plan of action Ken should take to get answers to the questions.
2. What major factors may contribute to Ken's decision to apply for the position in the DA's office?
3. If Ken applies for the position and it is offered to him, how should Ken's long-and short-term goals enter into his decision whether to accept the position?
4. Draw some conclusions about your suggestions given to Ken. Why is it not a good idea to conclude: "every DA's office is similar" to the one where Ken works and, thus, "every government agency has similar characteristics"? Expand upon your conclusions.

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Case Number 49

Now What?

by Kurk Shrader, Business Teacher, Elmwood-Murdock High School, Nebraska

Marcy, a competent and hard working employee, works as an administrative assistant for Redarsh International, a rapidly growing electronics corporation. Now 30 years old, Marcy has worked for Redarsh for nearly 14 years.

Marcy started working at Redarsh while she was a junior in high school. She enjoyed her part-time secretarial work so much that she enrolled in several business courses during her junior and senior years. Upon graduation, she intended to attend a nearby community college and pursue an Associate Degree in business, possibly accounting.

Marcy was a dependable employee. Her supervisor's evaluative reports often ranked her secretarial skills as "excellent." She was a favorite among the permanent, full-time employees and highly respected for her friendliness, efficiency, and dependability. Based upon a "good employment record," Marcy was offered full-time employment upon high school graduation. After much consideration, Marcy accepted the position and chose not to attend college (although she has taken a couple of night classes during her term of employment.)

During the past 14 years, Marcy has excelled at Redarsh International. She has received numerous pay raises and promotions within the organizational structure. Recently, she was promoted to a position with supervisory responsibilities; as a result, she has started receiving profit-sharing benefits. She receives a good salary, health benefits, paid vacations, and retirement benefits. Marcy continues to enjoy her employment at Redarsh and looks forward to lifelong employment.

Marcy's personal life is also going well. She likes living in her hometown. She is close to her family, has several close friendships, and is contemplating marriage with Alex. Alex is securely employed at a local firm as an accountant.

Redarsh International has expanded its market and is growing rapidly. In spite of the company's continued success, Redarsh International has decided to redirect its business operations; and as a result, move a couple of the corporate offices. Much to Marcy's surprise, Redarsh International announced a move of her office to a large metropolitan location 500 miles from her home. With the move, Marcy was offered a position at the new location. Redarsh offered her a promotion, equivalent benefits, profit sharing, and moving expenses.

If Marcy accepts the position, she will have three months to make the move. Her company record will remain in tact, and she will maintain her current level of benefits. If Marcy declines the position, she will have to seek new employment. She will lose her insurance and retirement benefits, but she will receive a buy out, a one-time compensation equivalent to $5,000. Marcy is confused; she loves her job, and she could see herself retiring from Redarsh. She found that promotions and profit-sharing opportunities came easily in spite of the fact that she never attended college. Marcy is also very family oriented; a move will be difficult. Her possible marriage to Alex is also adding to the difficulty of the decision. His job is secure and promotions are likely.

Marcy is a critical juncture in her career development. Contemplate her options and discuss her career opportunities as they relate to the following questions.

1. What are Marcy's options?
2. Are there options not presented in this scenario? If so, what are other visible options?
3. What are the major considerations related to each option identified in question 2 in this case?
4. What are the advantages and disadvantages for each option?
5. What kinds of educational and personal experiences have provided Marcy with the job skills to make her successful at Redarsh International? What implications do these skills have upon her career options?
6. Are there career development decisions that Marcy could have made that would have helped her avoid these decisions?
7. What recommendations do you have for Marcy should she accept the new position?
8. What recommendations do you have for Marcy should she reject the new position?

Case Number 50

Responsibility as a Team Player

by Marilyn R. Chalupa, Assistant Professor, Ball State University

InfoLearn is a training company located in a city of 150,000 that has a diverse business environment ranging from high tech to manufacturing. InfoLearn is a fairly new company that is establishing a highly reputable reputation for implementing up-to-date training programs customized to meet clientele needs. Thus their people are in great demand. Currently they are planning to add six more specialists and one or two administrative assistants as the need for training is increasing.

InfoLearn operates under a matrix or project-based organizational hierarchy. Clark Wood is the manager in charge of twelve specialists and four administrative assistants. The specialists each have their area of expertise and are assigned by Charlie to projects based on the expertise needed.

Eleven of the twelve specialists had prior training experience before coming to InfoLearn. Julie, the most recently hired specialist, just graduated from college and had very little training experience except what was required of her in the training and development classes. Julie is a single parent of a one-year old and is excited and eager to use the skills she learned. Julie has just been teamed with Jack, Kyle, and Rochelle to develop a two-day training program for a local company about discrimination in the workplace.

Before Julie came on board, the team members had gathered the background information needed from their client and had reached consensus on the objectives of the training program. They had worked for this client before and knew that this topic would be a sensitive one that needed to be handled delicately. The next phase involved gathering content and determining what strategies are most effective in delivering the content. The first team meeting with Julie was basically an introduction for Julie to get acquainted with the team members, learn about the client, and be updated on the background work already completed by the team. Discrimination in the workplace is one of Julie's areas of expertise. Therefore, she eagerly sought the responsibility of gathering the content. In fact, she even knew what strategies were most effective as she researched this topic in one of her training and development classes and earned a high grade.

At the next team meeting, Julie had the content all typed up in a neat lesson plan format and distributed copies to her team members indicating what part each person would take. She then proceeded to explain how she had done this very same topic in her college class. Jack, Kyle, and Rochelle all listened politely and gave each other glances that indicated something was awry. Julie felt she had really done her part well.

Kyle, the team leader, carefully asked Julie questions about her approach and to justify how they met the objectives. Julie indicated they didn't really need to worry about that. She reiterated that this project received a high grade in her class. Jack and Rochelle each tried to tactfully explain to Julie why this approach would not work with this particular client. Julie could not understand their concerns. In fact, she so much as stated, "You're just jealous because I'm new and I know this stuff!" The meeting ended on a bitter note.

Kyle, Jack, and Rochelle talked among themselves as to what to do next. They bounced ideas off each other and revised Julie's plan to better fit the client's objectives. In reality, Julie's plan was not bad; a few adjustments were needed to suit the client's objectives. They all wondered aloud what will take place at the next meeting.

Kyle started the next meeting by reiterating the concept of teamwork and complimenting Julie on how complete her information gathering had been. He then proceeded to tactfully explain the modifications and why they were needed. Julie became upset immediately when Kyle mentioned the modifications. She said, "I've done my part. If you want to change it, go ahead. The rest is up to you," and walked out.

1. Examine Julie's attitude toward being a team player.
2. What is the problem?
3. What should Kyle, Jack, and Rochelle do now? Evaluate your options for short-term and long-term results.
4. Discuss what responsibilities one has as a member of a team.
5. Discuss what responsibilities one has as a team leader.

Case Number 51

A Day In The Life Of A Systems Analyst

By Terry D. Lundgren, Professor, Eastern Illinois University

This case will be a day in the life of Dave Watkins, a systems analyst with the DENRO company. DENRO is a Fortune 500 company with a large Information Systems (IS) Division. There are about 60 maintenance programmers, 40 new system programmers, and 45 systems analysts in the Applications Department. Dave began with the company four years ago as a programmer. He got the job on the basis of two years experience programming in COBOL in a mainframe environment and a bachelor's degree in business.

4:22a A call wakes Dave up from a sound sleep. It is from the DENRO operations department. Susan says, "Hi Dave, this is Susan in operations. I'm sorry to call you at this time, but we have a problem..."

"What is the problem?" Dave asks, still a bit groggy.

"It's the billing program," Susan explains, "we are about half-way through the BIL017A print module and the console is giving me a divide overflow message. I called Martha who is the maintenance programmer on the system and she said she didn't know what the problem might be. But she said that you were the previous maintenance programmer and you might know. Do you have any idea what is going on?" pleaded Susan.

Dave thought a moment and replied, "Yes, I bet it is because they never incorporated the input check routine I suggested and someone put in a zero in a quantity value. Just restart the program and skip the current record. It will give you an error message that shows the record ID and values. Print that and give it to Martha, she will know what to do with it. The program should process and end normally.

"Sounds good," said Susan, "I'll do that."

"Be careful not to reset the data file, just restart the program. That should do the trick."

"Thanks," said Susan, "Sorry to call you at this time. Goodbye."

8:30a Dave arrives at work and goes to his cubicle work area. There is a message from Susan in operations thanking him for his help. It has been almost a year since he was on the billing system. He wonders how long he will be tied to that system.

He is presently assigned to the JIT (Just In Time) Inventory Project team. The project manager is Barbara Quill, an experienced senior systems analyst. They have just completed the preliminary investigation stage and received the go-ahead from the Systems Review committee.

Dave looks at his schedule and sees that he has a 9 o'clock with Bill Temple, one of the project team programmers, to review some specification changes that have already come in. He needs to check with Bill to see if the changes seem feasible from a programmer's perspective. He gets the change folder and puts it on his desk. Before the meeting, Dave figures he has time to call John Maser in Administrative Services and get a different meeting room for next week's project meeting. Barbara, the project manager, had asked him to do that since the room they were meeting in was too small and they were crowded around the table making everyone uncomfortable. Dave dialed for John and got him on the first try.

"Hi John, this is Dave Watkins on the JIT team."

"Oh, hi Dave, what can I do for you?" asked John.
"We need a slightly larger meeting room for our weekly meetings," Dave said, "the present room is too small. We need a room that will hold about 12 people."

"Okay," John answered, "let me get the occupancy schedule book and see what is available. Do you want the same times?"

"Yes, Fridays at 11."

"How about a room in the Annex?" John asked. "It is available and has a nice conference table for up to 15."

"Well," Dave slowly answered, "most of our users are in the 22nd street building and going to the Annex will really be inconvenient."

Dave continues to bargain with John to get a meeting room of the right size and in the right location. He reminds John that the JIT project has been given top priority and that the project manager, Barbara Quill, will remember any favors.

9:00a Dave goes to the other side of the building to Bill Temple's cubicle with the change specifications. There is a note on Bill's terminal that he is in the B break room. Dave goes to the B break room and sees Bill.

"Hi Bill, I've got the change specifications and need for you to look them over. We need to know if they present any special programming challenges."

He gives the folder to Bill and while Bill looks over the specs, he gets a cup of coffee. Bill asks some questions, and after a while says that he doesn't see any special problems. Dave thanks him and returns to his work area.

9:25a The next item on his ToDo list is to make a minor change to one of the DFD's (Data Flow Diagrams). Dave brings up the CASE (Computer Assisted Software Engineering) on his terminal, loads the DFD and makes the change. He prints a hard copy and sends e-mail to the other project team members telling them what he has done. While in the project CASE, he sees some files that are obsolete and does some housekeeping to clean up the project dictionary.

10:00a Dave meets with Barbara Quill to review the project management schedules. After talking about the schedules and the allocation of resources available, Barbara suddenly tells Dave that Ellen Fayron, an experienced analyst on the team, is leaving.

"Ellen is leaving?!" Dave exclaims, "but she is a key member. She did a lot of the preliminary analysis on the hardware. She will be very hard to replace. Why is she going? Where is she going?"

"Whoa, slow down," Barbara answers, "Ellen got an offer from her head-hunter that she felt she couldn't reject—s substantial increase in salary and a position at a prestigious consulting firm. Our problem is who to select to replace her on the team. I have a list of those available for assignment and I wanted to ask your opinion of them."

They discuss the relative merits of those available and who would be best for the JIT team. Barbara thanks him and reminds Dave about getting the new product regulations that might affect the project.

11:30a Dave returns to his work area and runs a demo GUI (graphic user interface) for one of the user input screens. It looks okay so he puts it on the agenda for the next project meeting and sends an e-mail to the team programmer who set up the GUI.

12:00p Dave goes to lunch with friends in Accounts who Dave used to work with when he was a maintenance programmer. He meets them at its usual place, the Mexican Hat, which is known for its good food, large booths, and most importantly, their accommodating and fast service.

Dave tells his friends about the early call from operations and what happened. This reminds him of an old story, which he tells the group: It seems that a new maintenance programmer trainee asked about his job duties. Dave told him that he would be making routine changes to report titles for the next week. Shocked, the new programmer said: "But I'm a college graduate!"

"That's all right", Dave said, "I'll show you how."

Dave then tells his friends about the progress on their new project and about the possible new federal product regulations that might affect the project. He finds out from the group that he needs to go to the down-town state building to get a copy of the regulations.

12:40p Dave drives down to the state building to get a copy of the new product regulations. Parking and finding the right office takes more time than he thought, but the office didn't open until 1 pm anyway. Dave pays for the copy and returns to work.

1:15p Back at his workspace, Dave sees that his afternoon schedule only has a 3 o'clock with a hardware vendor so he thinks that he can get some work done on his ever increasing ToDo list. First priority is to start the data gathering on the old inventory system. As he begins setting up a survey form, Barbara stops by and introduces him to Stephanie Falks who is being considered for Ellen's replacement on the JIT team.

2:00p Barbara suggests that Dave and Stephanie take a break and discuss the JIT project. Dave realizes that Barbara wants him to interview Stephanie to determine how well she will fit into the team. They go to the A break room and talk about the project.

2:30p Dave works some more on the survey format and gets it about ready. He lists the steps he will take and roughs out a schedule for completing the data gathering to make sure it matches their initial estimates. He will take it to the next project meeting for approval.

3:00p The hardware vendor arrives. Dave takes notes in the CASE and gets the specifications and prices. This information will be used in the systems design phase. Dave assures the vendor that they are on the list when the RFPs go out.

3:45p Dave gets the demo GUI for one of the user input screens that he looked at before lunch. One of the entries seemed to be in the wrong location, so he changed the Visual Basic code to move the field.

3:52p Barbara Quill calls and asks Dave about the meeting room situation. He tells her that it is all under control and when he gets a final authorization, he will e-mail the new room to the project team. Barbara asks Dave what he thought of Stephanie. They discuss how Stephanie will work out.

4:00 Dave retrieves his notes on the survey plans for the existing inventory system and gets the names of people in that area from the company directory. He calls and begins to set up interviews for next week, carefully placing all times and dates in the CASE personal scheduler. He will call them a day before the interview as a reminder since this department does not have access to the e-mail system.

4:50p Dave reviews the project schedule, his personal schedule and ToDo's for the rest of the week in the CASE. He is adding some notes as a system message pops up on his display warning him that the system will be brought down in five minutes. He signs off.

5:10p Bill Temple, the project team programmer he met with this morning, stops by on his way out. With him is Aaron Temple who Bill introduces to Dave as his younger brother. Aaron wants to go into systems work after he graduates from college. He enjoys programming and has taken C and COBOL courses in his degree program. Aaron has heard that systems analysts don't do programming, so he wants to be a programmer like his brother Bill. Both Bill and Dave chuckle, and Dave explains that although his job is systems analysis, he still does programming.

5:22p Dave drives home. After starting dinner, he turns on his home system.

1. Since many systems analysts have a programming background and programmers do become systems analysts, why not eliminate the distinction and make both positions programmer analysts? Some companies have moved in this direction. Why would you keep/not keep the distinction between programmers and analysts?
2. Do you think that you have all of the necessary skills and traits to be a systems analyst? If not, what specific skill or trait would you develop to be a successful systems analyst?
3. Students who are interested in a career in systems analysis and design have commented that they can't wait to get into the real world where they can concentrate their efforts on a single project, unlike the conflicting demands of different courses during their student days. Based on the case study, is this likely to be an accurate picture?
4. Considering this case study, what does a systems analyst do? How does a systems analyst spend their time? Make a general list of activities for Dave and how much time (in hours) he spends in each activity.
5. Could this case study actually occur? What parts of it, if any, seem to be a bit exaggerated?
6. Recall that Dave's project manager (Barbara) asked him to informally interview a candidate (Stephanie) for the project team replacement. Dave knew that he was being asked to determine how well Stephanie would fit into the team. Suppose that Dave did not "hit it off" with Stephanie on a personal level, but realized that she was qualified. What should he tell Barbara?
7. This case study is atypical in that CASE is used. The fact is that the majority of systems analysis and design is done without CASE or CASE tools. How would the case study be affected if the CASE were removed? You should be able to mention several specific changes and effects.

Case Number 52

If We Do All That Is Necessary, the Odds Are In Our Favor

by Rosemary McCauley, Professor, Department of Information and Decision Sciences, Montclair State University, Upper Montclair, New Jersey

Amy has always enjoyed working with computers. While in college, she was a Lab Assistant for the School of Business Computer Lab; she enjoyed helping students with their computer problems as well as handling the technical aspects of her job. In her senior year, Amy did an internship in a Fortune 500 company as a Help Desk Coordinator in the Information Systems Department. Amy was always eager to learn and enthusiastic in her interactions with people. The fine work she did in her Internship did not go unnoticed. As a result of her impressive work, Amy landed full-time employment upon graduation with the same company. She was hired as a Systems Analyst in the Information Systems Department.

As a Systems Analyst, Amy was called upon to work closely with end users on a project basis to analyze work flow and propose system changes. As recommendations were accepted, Amy followed through in the purchase of hardware and software, set up the systems, and trained the end users in the new system. Her work gave her insights into many departments throughout the organization. She was diligent in keeping up to date on new hardware and software trends and had many opportunities to hone her communication and presentation skills. She had a series of promotions—including a two-year stint as a Groupware Trainer, which enabled her to work with employees from all sectors in the organization on a conversion when a popular client-server product was being phased in. When that project was completed, Amy was promoted to Senior Analyst.

Amy has been on the job now for seven years. In a recent reorganization of the Information Systems Department, a new position has been created. The new job for an Associate to the Corporate Information Officer provides a career advancement opportunity that Amy has been hoping for. After responding to the job posting, Amy has been informed that she will be interviewed for the position.

As Amy prepares for the interview, she studies the job description and responsibilities. Two of these responsibilities include:

"Determine corporate business problems and prepare technical solutions."

"Head the technical education of the Executive Team."

Amy wants to make a fine impression at the interview and knows that she will probably be asked to give some specific ideas on how to accomplish these responsibilities.

1. What personal characteristics does Amy possess that are suitable for the new position?
2. What work experiences can Amy describe that complement her preparedness for the new position?
3. What skill sets has Amy demonstrated that are appropriate for the new position?
4. What specific activities should Amy undertake to best prepare for the interview in general terms?
5. How should Amy prepare herself to demonstrate how she can "determine business problems and prepare technical solutions?"
6. What might be a specific recommendation that Amy might make in response to item 5. Develop this idea more fully.
7. What ideas can Amy suggest by which she can "demonstrate how she can "head the technical education of the Executive Team?"
8. Take one specific idea from your response to item number 7 and develop that idea more fully.

Case Number 53

California Bound

by Robert M. Schramm, Professor, University of Wisconsin-Whitewater

Donner Community College (DCC) offers two-year programs for community members in the Walworth, Wisconsin, county area. Cheryl Parks is a recent graduate of the Donner Community College Personal Computer (PC) Support Program. The program included the following classes:

Introduction to PC Software
Introduction to PC Hardware
Advanced PC Software
PC Software Training
PC Troubleshooting
Introduction to the Internet

While attending DCC, Cheryl dreamed of moving to California. In fact, she learned there was a tremendous demand for PC specialists in California. However, Cheryl cannot afford an extensive job search. She can't afford to travel to California and apply for jobs while staying in a hotel room. She believes she needs to get a head start on her job search before moving out to California. One of her former teachers suggested that she request a California newspaper, respond to some job advertisements, and request an interview during a specific time period that she would be visiting the sunny state. Although this is good advice, Cheryl thought there must be a better way.

Cheryl remembered in her Introduction to Internet class that she was able to locate several types of information for various research reports. She began to wonder if she could somehow use the Internet to apply for a job. As she pondered the situation, Cheryl became more confident that the Internet may be her best option. She decided to wake up early the next morning and start investigating potential job postings in California as soon as the computer lab opened.

1. What do you think Cheryl's chances are of getting a job interview using the Internet?
2. Identify any Uniform Resource Locator (URL) addresses on which Cheryl can post her resume.
3. Identify any URL addresses that Cheryl can use to find job postings in California on the Internet.
4. If Cheryl asked you to create her resume for posting on the Internet, how would it look?

Case Number 54

Was It a Slip of the Tongue?

by Roger L. Luft, Professor, Business Education, Eastern Illinois University

The Bennett Company is a large Human Resource Company located in the Southern United States. They supply temporary workers to offices and high technology companies. Their specialty is highly trained workers who use and repair the technology in large companies. There is such a demand for well-trained workers that Bennett is growing very rapidly and has expanded to several large cities throughout the South.

Most of the large companies that use temporary workers from Bennett find that they can actually save money if they do not have to train the workers themselves, and because the companies "rented" the employees from Bennett, payroll and benefits are all handled by Bennett. Bennett bills the companies each month for the services provided by the temporary workers.

Because Bennett is growing so rapidly and they are constantly retraining existing workers and training new workers for new technology, some of the top managers were in discussions about reorganization and a new department. Charles Crowly was one of the managers who was in charge of the Human Services Division. It was his division to which the new department would be attached, however the Vice President to whom Crowly reported would be the one to make the final decision and would be highly involved in selecting the person in charge of the new department. The new department would be the Human Resource Development Department.

At coffee one day, Charles Crowly found himself alone with Rene Sloan, one of the top trainers who would be a part of the new department. Crowly, in the conversation, suggested to Rene that she would be a good candidate to head-up the new department. He said that he thought she was quite visionary and could see where the department should go. Charles caught Rene off guard. She had not thought about assuming a supervisory role and was very content doing what she was doing. She also knew that Charles Crowly often "spoke out of turn" and that others would be involved in the decision making process. Charles ended their coffee conversation by suggesting to Rene that she think about what he said and that maybe they could get together at a later time to discuss it further.

Rene was a little confused because she knew that the managers weren't to the point that they could talk to anyone about the position. She also knew that she would have a difficult time working directly under Charles Crowly...he had not made a very good impression on her or any of the other trainers who know him. She didn't know what to do.

1. Was Charles Crowly being a responsible manager in saying what he said to Rene?
2. What should Rene do or say following this coffee conversation?
3. What do you think were the motives of Charles Crowly?
4. What might happen if Crowly's boss, the Vice President, found out what happened? Is it Rene's responsibility to talk to the Vice President?
5. If you were the Vice President and found out that a conversation like this had taken place at this point, what actions would you take?
6. If Charles Crowly often spoke out of turn at Bennett Company, how much credibility should Rene give to the conversation? Should she take him seriously about his offer or should she just forget about what he said? Why?
7. If you were to write an ending to this scenario, how would you write it?

Case Number 55

A Dog Wagging Tale

by Donna L. McAlister-Kizzier, Associate Professor, University of Nebraska-Lincoln

Sally, astute and competent, has worked in a small department of a large university for 15 years, becoming the department's first office manager five years ago. Sally enjoys her job. She finds the work interesting and likes the people with whom she works. During the last 15 years, Sally has pursued a degree in information management at the university. The department chair is supportive of staff completing degrees, facilitating flexible scheduling. Since graduation two months ago, Sally has reorganized her job responsibilities to allow her to focus more on managing information technology in the department. To allow her to reconfigure responsibilities, she delegated several former responsibilities to the two full-time departmental secretaries.

During the last three years, operating budgets at the university have been eroding. One of Sally's job responsibilities as office manager is to closely monitor the use of operating funds. In order to control costs, faculty are forbidden access to all departmental office equipment, including photocopy machines, and all requests for clerical support are funneled through one secretary. This system allows the chair to review each faculty member's total use of operating funds each month. Faculty, who are young, dynamic and productive, have become increasingly frustrated with shrinking levels of administrative support and the ability to respond quickly to opportunities. At a time when productivity expectations at the university are increasing, support is decreasing; faculty members voice the concern that the present control system seems to penalize those who are the most productive and innovative.

In addition to Sally, the department has two full-time secretaries, Billy and Jim. Billy, highly productive and technologically competent, was hired two years ago. Although faculty members appreciate Billy's technological expertise, they are dissatisfied with Billy's exuberance in controlling office resources. Billy, who formerly worked in a law office, often bluntly questions the "stupidity" of jobs given to her by faculty. When Billy does not want to do a job, she uses one of three tactics:

1. She tells faculty members the chair forbids her to do that particular job
2. She delays doing the job to the point where the faculty must do the job him/herself, or
3. She asks faculty to write long justifications for the job request. This behavior normally occurs when the chair is inaccessible by faculty. Billy told Sally the she is "training" faculty (just like she "trained" the attorneys); to make her job easier to manage.

Jim was hired two months ago to replace a secretary who recently requested to be transferred to another department. Jim is personable, competent and eager to please. Sally recently delegated several of her large job responsibilities to Jim and found him to be highly competent. Faculty members, increasingly reluctant to give work to Billy, are approaching Jim more frequently with their clerical tasks. The support staff problem is making it difficult for Sally to complete the realignment of office duties. During the last week, one frustrated faculty member mentioned to Sally that because of support problems, he is doing all of his own clerical work (often using his personal funds) and he had talked to other faculty who are doing likewise. He warned Sally that faculty will not tolerate the situation for long. The faculty member had attempted to discuss the issue with the chair, who reacted defensively with several biting memos to the faculty member.

Tensions are heightening in the department. One young, productive and highly respected faculty member resigned during the last week, citing as one key reason for her resignation the increasingly "non-supportive" culture within the department. Word is spreading through the university grapevine that the chair may resign. In a recent faculty meeting, one frustrated faculty member described the department as an environment in which the "tail is wagging the dog". As tensions escalate, Sally is left contemplating the situation. The chair is due back the next day after several days out of the office.

1. Who are the key actor(s) in the case?
2. What are the key issue(s) in the case?
3. To what extent should the key actor(s) you identified in question 1 become involved in resolving the support staff issues?
4. If you were Jim, how would you handle requests for support from all faculty members; those faculty supported and those not supported by the previous secretary? Provide a sound rationale for your answer.
5. What are Sally's options?
6. If you were Sally, what actions would you take? Why?
7. If you were an external consultant brought in to analyze the quality of support in the department, what strategies would you recommend to resolve the problems described in the case? Explain why you selected these strategies.
8. What do you think the faculty member meant by the department being one in which the "tail was wagging the dog"? What are the implications for personnel working in this kind of environment?

Case Number 56

Nellie's Two Personalities

by Marilyn R. Chalupa, Associate Professor, Ball State University

Nellie was recently promoted to director of Human Resources at the local community college located in a community of 50,000. The office employs five people and closely adheres to the equal employment opportunity guidelines.

Nellie had extensive background experience in affirmative action and interviewing before working for the college; she was an interviewer with a company in the same community. In addition, she has a management degree with an emphasis in human resource development. Five years ago, she accepted an interviewer position with the college as she felt there were more opportunities for advancement than with her current employment. After all, she was overlooked for promotion from within the organization where she had been employed. She feels her move to the community college has been a good move.

Nellie now oversees the department's five people consisting of one lawyer, one interviewer, and three administrative assistants. Nellie has been director for six months and her probation performance review has been completed. Her subordinates and the attorney believe she is fair, has high standards, and keeps current with affirmative action and interviewing requirements. Lately, however, the assistants and the interviewer have noticed that she is not sociable with them unless one of her superiors is present. Most of the time she is quite firm and hasty when delegating responsibilities to the assistants. She seldom speaks to the administrative assistants unless she is delegating tasks. Upon completing the tasks, Nellie does not say "thank you" or extend any verbal or nonverbal expression of appreciation, unless a superior is present. They are lucky to get a smile or a "good morning" from her when she walks by their desks. The interviewer has expressed similar sentiments and feels slighted now that Nellie has been promoted. Reed, the attorney with whom she has always worked closely, is the only person Nellie seems to talk to socially at the office.

Recently, when Sharene, the interviewer, was attending a workshop, she saw Nellie talking to another HRD director across the room. Nellie spotted Sharene and went out of her way to cross the room to acknowledge her. Sharene was surprised to see Nellie in attendance and that she took the time to acknowledge her when back at the office Nellie was barely sociable. Sharene saw a side of her boss that she had never been at the office except with Reed. She is puzzled. Why was Nellie so friendly at the workshop when she barely acknowledges Sharene at work?

1. Why do you think Nellie's behavior changed after the probation performance review?
2. Discuss why you feel Nellie behaves differently toward Reed.
3. Why do you think Nellie's behavior toward the interviewer was more sociable outside the office?
4. What is considered appropriate socialization in the workplace?
5. What would you recommend Sharene do, if anything, about Nellie's "two personalities"? Evaluate the potential results of your recommendations.
6. Do you feel that Nellie's behavior is appropriate or inappropriate? Provide a rationale for your response.

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Case Number 57

Technically Qualified But Lacking Self-Management Skills

by Marilyn R. Chalupa, Associate Professor, Ball State University

Public Utility is a located in a community with a population of 5,000. For generations, people in this community knew they could get a good-paying job at Public Utility without much education or training beyond high school. The local high school always had an excellent cooperative venture with Public Utility and its business department, with many students working as interns for Public Utility on a part-time paid basis to earn money and acquire work-related skills.

Cassandra has been with Public Utility for almost three years, one of which was as a part-time paid intern while in high school. Upon graduation, Public Utility hired her for full-time employment. She was a quick learner, accurate, detail oriented, and punctual. When the supervisor of Communications was recently diagnosed with cancer and took an extended medical leave, Cassie was promoted to supervisor of Communications.

Cassie now supervises the eight employees with varied responsibilities. Some transcribe documents and others work with graphics and desktop publishing to create brochures, flyers, and other documents. Some of the documents created by Cassie's group are included in the monthly bills mailed to customers. Frequently, Cassie helps the employees meet deadlines by taking on some of the tasks she used to do. She really enjoys helping people.

Although the department meets its deadlines, other work that Cassie is responsible for does not always get done on time. Just last week, Kyleigh, Cassie's supervisor, asked Cassie to come to her office. Kyleigh asked her for the special report summarizing the amount of training her employees had acquired for the new software to be implemented within three weeks. Training was to take place before the actual implementation so that there would be minimal interruption when the change took place. Cassie had to admit that it did not get completed as she was busy helping her people complete tasks that needed immediate attention. They were behind because of the time needed for this special training. Kyleigh reminded Cassie that this was the third report that she did not complete on time. Cassie left Kyleigh's office feeling frustrated. She felt more comfortable working with her staff than sitting in her office writing reports and delegating work. In fact, there were times when she was envious of her subordinates; they knew what their responsibilities were. It appears that her work is never ending and just keeps piling up.
She stays as late as she can, cuts her breaks short, and even works through lunch some days just to get caught up. There doesn't appear to be enough time to do everything! She doesn't feel appreciated. She feels guilty taking time to exercise or to enjoy a leisure activity.

1. What is the real problem? What are some symptoms of the problem?
2. What are alternatives for Cassie to think about? Evaluate the alternatives for short-term and long-term results.
3. What, if anything, could Kyleigh do to help Cassie? Evaluate the options for short-term and long-term results.

Case Number 58

What Went Wrong?

by Janice K. Barton, Associate Professor, University of Nebraska at Kearney

In many colleges, universities, and other governmental institutions, purchasing departments are a part of the administrative structure. The function of a purchasing department is to obtain goods and services for the school or institution at the best possible cost. The responsibilities of purchasing specialists are diverse and may run the gamut from buying toothpicks to placing bids for multimillion-dollar buildings.

John Clark has been director of purchasing at Southwestern University, a large state university, for five years. Clark started as a buyer ten years ago and worked his way up to the directorship. He is well liked by his staff and is considered to be an excellent administrator.

Clark is in charge of 30 employees. Ten of these employees are housed in the central purchasing department located in the university's administration building. Four purchasing agents and their staffs are located in other buildings on campus. These purchasing agents are responsible for specialized areas including food purchases for the dormitories, general supplies, scientific purchases, and technological equipment. All of the paperwork is processed through the central purchasing department. The department is responsible for processing requisitions, obtaining prices, placing orders, preparing invoices for payment, and making travel arrangements for university personnel.

The staff in the central Purchasing Department office consists of an assistant director, his secretary, an administrative assistant to Clark, and seven clerical employees. Morale is high, and each person considers him/herself a team player.

Pete Clemson, the assistant director, has been at the university for two years. He came to Southwestern from a similar position at Cannon College. Karen Martino, administrative assistant to John Clark, has worked in the department for six years. She was hired as a mail/quotation clerk and has been promoted to secretary to the assistant director and then to her present position as administrative assistant to Clark.

The other employees have worked in the department from two to twenty years. Everyone is well trained and is very competent at his or her job. Employees are involved in making decisions regarding the manner in which work is handled at their desks. The staff functions without a great deal of intervention from Clark. Clark maintains an open door policy, and personnel feel they can go to him with any problems.

Clark has been a mentor to Clemson and Martino. He believes that Clemson has the ability to become a purchasing director after he gains a few more years' experience. Clark trusts Martino explicitly. Because of her expertise and good judgment, he has entrusted her with several high-level responsibilities.

In December, Clark is approached by a major university and offered a position. Although he loves his work at Southwestern, he cannot turn down this career advancement. He accepts the offer. His position at Southwestern is advertised, and Clemson applies. Because he has no experience as a purchasing director, he is not offered the job. The university's administration selects Brad Harris, the purchasing director from Cannon College, to fill the position. Clemson had worked under Harris' supervision at Cannon for several years before coming to Southwestern. He had resigned because he could not get along with Harris.

From the beginning, the purchasing staff senses a dramatic difference in the way Clark had run the department and the way Harris is running the department. Harris is considered to be a shrewd businessperson and performs his major purchasing responsibilities well. He tends, however, to become too involved with tasks that had previously been handled by Clemson, Martino, or the clerical workers. Everything has to be cleared through him, and the staff feels that he is always "breathing down their necks." They are no longer allowed to use their own initiative in handling many details of their work. Previously, communications had been open; now communication is initiated by Harris with little opportunity for feedback.

Clemson and Martino are becoming very dissatisfied with Harris. Harris has taken the more challenging tasks from Martino and does them himself. He continually criticizes Clemson's work. Dissatisfaction with Harris becomes evident among other staff members as well. He is the topic of discussion during many coffee breaks, and gossip runs rampant. Although Clemson and Martino do not contribute to this gossip, their dislike of Harris is evident.

Five months pass and tensions mount in the department. Clemson, Martino, and three of the clerical workers give notice that they will be resigning effective the first week of June. The timing is unfortunate, as June is one of the busiest months for the department.

The resigning employees give adequate notice so that replacements can be hired and trained before they leave. Harris, however, does not hire replacements until after the five have left because he doesn't want these disgruntled employees to train the new hires. Two inexperienced clerical workers are hired soon after the old staff leaves. Harris is still in the process of hiring a purchasing agent, administrative assistant, and order clerk.

At a time of peak work load, three key positions in the department are vacant and two positions are manned by inexperienced workers who are unfamiliar with the department. To get the work done, the workload is shifted to the experienced department personnel. Harris also announces that because work is piling up, vacations cannot be taken during the remainder of June or in July. All of these factors contribute to a further weakening of morale, feelings of resentment toward Harris, and an overall decline in productivity.

1. What are the major problems in the department?
2. Since the staff was so loyal to John Clark, is it likely that they would show resentment toward any person hired for this position? Why or why not?
3. Identify Harris' management style.
4. Should the five persons who resigned have waited until after June to give notice? Why or why not?
5. Did Harris exercise poor judgment in waiting to fill the five vacancies? Explain.
6. Considering the circumstances, is it possible for the purchasing department staff to regain their high morale and efficiency? Explain.
7. If you were in a position of authority over Harris, what would be your recommendations for resolving the many dilemmas in the purchasing department?

Case Number 59

The Case of the Changing Transcript

by Karen C. Kaser, Assistant Professor, University of Houston-Downtown

Nancy is an excellent student at Southern University. She maintains a 3.8 GPA while carrying a full load of classes and working part-time in the transcript office at the Administration Building. Nancy's co-workers in the transcript office are very fond of her and have delegated a great deal of confidential responsibility to her. Nancy is in charge of updating grades on student transcripts. All information she inputs must be very accurate and kept confidential. Nancy has become very proficient at entering and changing data on student transcripts. She is highly trusted in her job, and she knows how to access and change college transcripts.

Denny is an extremely outgoing, fun person. Unfortunately, he played too much during his freshman and sophomore years of college and his 2.2 GPA is proof. Denny currently is enrolled in the College of Education with a major in Social Studies. The requirement for graduation with a teaching degree is a 2.5 GPA. Denny has the ability to do much better work. He started college with a Regent's Scholarship after being valedictorian of his high school graduation class. He regrets his earlier actions, but he has been unable to raise his GPA to meet the requirements for the teaching degree.

Nancy met Denny at a student government meeting last year. They are very active in campus organizations, have become very close friends, and are contemplating marriage. Both Nancy and Denny are seniors. Nancy wants Denny to succeed in his career goals. Lately, Denny has been hinting to Nancy that she might be able to help him by changing the grades on his transcripts to reflect a more favorable GPA. Nancy wants to help Denny, but she worries that her actions might be discovered and that she could get into serious trouble.

Graduation is only a few weeks away and Denny's GPA will not allow him to receive his teaching degree. He desperately wants to graduate with Nancy and puts pressure on her to change his grades. One night Nancy agrees to stay overtime at work to input a backlog of grades into the computer system. No one else is working overtime on this particular night. This might be the ideal time to update Denny's transcripts with more favorable information.

1. Who are the key actors in this case?
2. What are the conflicting issues in this case?
3. What ethical dilemma does Nancy face?
4. What could happen to Nancy if she decides to change Denny's records?
5. What is an alternative way that Nancy can help Denny?
6. What would you do if you were Nancy?

Case Number 60

Information Systems Training Corporation

by Robert M. Schramm, Professor, University of Wisconsin-Whitewater

Kate just completed her End-User Information Systems degree at a local college. Upon graduation Kate was hired as an end-user trainer for Information Systems Training (IST) Corporation. IST is a small family-run company with five full-time employees and five part-time trainers. The owners, Cheryl and Martin Briggs, are former teachers who started the company five years ago in an effort to take advantage of the computer end-user's growing need for software training. ITS provides beginning, intermediate, and advanced software classes for computer end-users. Classes in both the DOS and Windows platforms are offered. Macintosh software classes are not yet offered by the company. The classes range from one to three days. The cost is approximately $300 per day for each trainee.

Cheryl is the President of the company and Martin is Vice President of Sales. Cheryl and Martin have little technical knowledge. When they started the company, they hired Bob McAdams as the training manager and technical specialist. Bob's title is Vice President of Training. He remains the only technical specialist in the company. Therefore, his responsibilities include maintaining the two computer training labs, purchasing new technology, managing the part-time training staff, and developing and teaching new training programs. The technical support of the computer training lab was beginning to require so much of Bob's time that he had little time to develop and teach new training programs that would bring in the needed additional revenue to help the fledgling company survive. Kate was hired to assist Bob in all his duties, especially the technical support of the computer training lab.

The first three months of the job went smoothly. Kate was becoming increasingly familiar with the technology in the computer training labs. The two training labs were identical. Each lab included eight personal computers (PCs) with the following technology:

Type:	Industry Standard IBM compatible 486DX2 machines
Speed:	40 MHZ
RAM:	8 Megabytes
Hard Drive:	250 Megabytes
CD-ROM:	None
Modem: None	

Both labs were networked to a common server running Netware 3.12. The latest software applications are accessible through the server. One problem was that the server hard drive was not big enough to hold all of the software being used to train end-user's. Therefore, Kate had to remove software every night from the server that would not be used the next day and install the software that would be needed for training the next day. This was even more of a cumbersome task because the software could only be installed by 3.5" floppy disks rather than by the CD-ROM drive. Another problem was the access time of the software was becoming noticeably slower with the cumbersome Windows95 software programs. The server had the following capabilities:

Type:	Industry Standard IBM compatible 486DX4 machine
Speed:	66 MHZ
RAM:	16 Megabytes
Hard Drive:	540 Megabytes
CD-ROM:	None
Modem: None	

While the computer training labs were acceptable five years ago, Bob and Kate both realize that the demands of the new software releases running on Windows95 are too much for the PCs. Therefore, Bob and Kate have begun to investigate strategies to upgrade or replace the PCs in the computer training labs. Cheryl has given preliminary approval pending the recommendation report to spend $18,000 on new hardware for the lab. The latest software releases have already been purchased as part of this year's budget.

Kate and Bob scheduled their first meeting concerning the new training lab equipment for Friday morning. At that meeting, Bob told Kate that he was tired of being overworked and had accepted another position. Later that day, Cheryl called Kate into her office. Cheryl told Kate she was very happy with her work and felt confident in her technical capabilities. Cheryl informed Kate that Bob had resigned and she offered to help with some of the training duties until they could hire a new trainer. Cheryl further informed Kate the immediate need for IST was for Kate to focus on the recommendation report for the new computer training labs. Cheryl directed Kate to submit the preliminary report to her within two weeks.

1. Do you think Kate should upgrade or replace the training lab equipment?
2. What are the advantages and disadvantages of upgrading the training lab equipment?
3. What are the advantages and disadvantages of replacing the training lab equipment?
4. If you replace the equipment, is there any part of the older PCs that Kate could use with the new equipment?
5. What sources of information are available for Kate to rely upon?
6. What would be the minimum computer type, speed, RAM, hard drive, and modem requirements you think Kate should consider?

Case Number 61

The Problems with Database

by Terry D. Lundgren, Professor, Eastern Illinois University

The Illso Corporation has had an efficient Information Systems Division for many years. Almost a decade ago, they made the change from a manual, forms-driven methodology to a CASE (Computer Assisted Systems Engineering) methodology. Approximately three-fourths of the present computer information systems have been successfully developed with the CASE application. A current project involves a reengineering approach which will create a new computer information system which integrates data and processes from many departments across the organization.

The systems analysis phase has bogged down because of the unforeseen difficulties in working with so many diverse areas. The problems center around the uniformity of the data stores. The context and system level DFDs (Data Flow Diagrams) have been accepted and approved, but the details of the data elements continue to plague the project. Each department seems to require a different definition of the data elements. Robert Jenkins is the system analyst assigned to work out the details of the data dictionary for the project. To hopefully gain consensus, Robert has arranged a JAD (Joint Applications Development) meeting with the participating departments. Robert acts as the facilitator and the active participants from the different departments are Jane, Jack, John, Amy, and Bill.

As the meeting proceeds, it becomes clear to Robert that each department has specific ideas on their data and how it is defined. Much of the preliminary discussion centers around the way an application deals with the client names. So Robert throws open the floor for discussion on the specific item of client name.

"We've had problems with name entry" said Jane. "A clerk enters the names as fast as possible since they are paid by keystrokes. Although their error rate is very low, the large volume of clients makes us have two or three name problems every month. The biggest problem is with irregular capitalization. A clerk enters John doe, missing the capitalization of the D in Doe. When we try to find John by looking for Doe, the application tells us it isn't a valid name. Now fixing this is a real problem. Even if we knew that it was really John doe with a lower case d, we can't make the change. It has to go through a change request form back to data entry. And we have to hold our account information until the change is made. So, many of our group just resubmit another new client form because it is faster."

"I know," whined Jack, an application programmer. "The last time I spent over two days trying to clean out the client file because of the bogus names. Those names you leave in there just clutter up the database and make all of the programs run slower and slower."

John, from another department, proudly says, "In our entry form, I've set up some verification code that checks against those kinds of errors. It makes sure that the first character of each name part starts with a capital letter. If it doesn't, my code automatically fixes it."

"I've got a clients named Ernie K–Doe, Renee LaCrois, and Ronald McDonald" Bill responds. "Each of them has another uppercase in their last name and Ernie has a dash too. Yes, that is the way he spells his name and how he wants it spelled. Will your verification work with him?"

Amy breaks in with "How do we deal with that singer, Prince, who changed his name to an unpronounceable symbol?"

"Yes," agrees Jane, "and how about our clients who keep changing their names?"

"Wait a minute," Robert facilitates, "what do you mean that they keep changing their names?

"Let me give you an example," Jane said, going up to the whiteboard. "I have lost too much time on this client not to remember it very well. When I look for her files, here are some of the names she has used." Jane writes the following list on the whiteboard:

Mrs. Worthington Smyth
Ms. Deleware L. Bainbridge
Mrs. Deleware Bainbridge-Smyth
D. L. Bainbridge
William Thompson

"There are probably some other combinations that I have missed," said Jane. The problem is keeping all of her information under the same client name."

"Where did the William Thompson name come from," asks Amy. "I don't see any connection."

"Yes, that is a good one," Jane answers. "That is her pseudonym or pen name. She is a fairly successful writer. And she does some of her business under the pen name."

Robert addresses the group and asks if there are any other problems people are having with client names.

"We have problems, too, with, I guess you would call them name additions," says Bill. "Some of our clients prefer their names to be preceded with titles like Professor, Reverend, Captain, Dr., and we even have a Duchess Mather Framingham. Then there are the John Doe, III or John Doe, Jr. names."

Jane says, "One of our other problems is with foreign names. We don't even know what is the first name, last name, or if any part of it is an addition. What do you do with a name like Vin The Ling?"

Robert takes the lead again and summarizes with, "Fine. Now we have a pretty good idea of the problems with client names. Let me explain how we work with this situation. First, we need to define how to store the name so that all of the data is captured and then we work with your applications to process the name." Robert walks over to the other whiteboard and continues. "I think you will see how this goes after we work through it. First, we have to define the way it will be stored." He writes the following on the whiteboard:

Name
Type
Length

"We need to specify each component of the client name by name, type, and length. Let's start with the first name. Suppose we call it FNAME (writes on whiteboard). The type will be alphabetic since it will be entirely composed of alphabetic characters."

"Wait a minute," said Bill. "What about the possibility of numbers, symbols, and other strange characters?"

"You are right," replies Robert. "We will make the type alphanumeric. This is the standard term to allow for any symbol including numbers, though the data will not be used as a number. Finally, we need to define the maximum character length for the field."

"Why can't we let that be variable," Jane asks. "We don't know how many characters there will be. It could be one or one hundred."

"That is, in fact, a critical question," Robert answers. "Today, almost all application programs and database programs are set up to use alphanumeric fields of a fixed length, whether all of the length is used or not. With our current tools, it would be prohibitive to use variable length fields for data. So, we need to define the maximum length of the filed to accommodate the largest data we think will be used. For example, a common length for a first name field is between 12 and 15."

The group eventually agrees that the following list will be sufficient for capturing all of the data associated with the client name.

Name	TITLE	FNAME	MNAME	LNAME	SUFFIX
Type	all alphanumeric				
Length	10	15	15	15	10

Robert confirms that the group is satisfied with the list, and then explains how to deal with the other problems. "With all of the data captured, now we can look at how to deal with things like misspellings, pseudonyms, foreign names, and other situations. Once we have the data, then we can write programs like Bill did to fix or determine problems. But, this is an entirely different operation which we will cover in later sessions. Today, we just want to define how to capture the data we need. Let's move on to the other data stores shown on the diagram you have.

1. Integrating systems that use personal names as data will continue to be a problem for the systems analyst. Discuss the possibility of an intelligent parser that can determine who an entered name really refers to. Such an application could be used to remove duplicate mailing list entries.
2. In the case study, five components of a client's name were identified. Would you change the length of any of the fields? Explain.
3. Which of the five components of a client name that were identified should be classified as optional as opposed to required? Which component(s) are absolutely necessary? Discuss.
4. Defining data elements is an integral part of a data dictionary. Given the discussion that occurred in the case study, what other information should be stored in the project dictionary?
5. In the case study, technical reasons were invoked to explain to the participants that data components had to be defined in terms of their maximum field length. Does this sound questionable? Why or why not?

Case Number 62

Information System Alternatives

By Terry D. Lundgren, Professor, Eastern Illinois University

The Jecorin Company provides temporary services for large organizations. These services are in the area of external administrative services such as executive security, company picnic arrangements, and providing accommodations for visiting personnel. Jecorin has a regional office in most major cities coordinated by the corporate headquarters in Dallas, Texas. The corporate offices have used mainframe information systems for many years for standard business functions.

The Systems Planning Unit at Jecorin was initiated about a year ago to coordinate and plan the systems projects through the development of quarterly strategic plans. The strategic plans are designed to identify and prioritize Jecorin's systems components in terms of their feasibility and potential contributions to the success of the organization. Using business plan analysis, the strategic plan for the last quarter indicated that a computer information system for the regional offices should be investigated. The proposed information system would provide computer support for much of the documentation used in the provision of temporary services.

An experienced systems analyst, Bill Kraken, was assigned to the preliminary investigation of the project. Following the standard organizational structured methodology, Bill did a thorough job and determined that the project had considerable benefit for Jecorin. During his presentation to the Systems Planning Unit, Bill planned to recommend that the project continue to the systems analysis phase.

Essentially, the project involved getting the master mainframe documentation from the corporate offices to the regional offices and giving them the capability to customize it. For example, over the years, Jecorin had worked out a complex set of factors for company picnics. The factors included the company size, type of picnic, projected cost per person, and several other factors that allowed them to generate specifications for the regional offices in terms of supplies, personnel, and documentation required. But the regional office regularly needed to fine tune the model provided by the home office because of unique local factors and unexpected changes that occurred before the event. This fine-tuning was not aptly named because it was done manually with paper and pencil. If more than a few changes were required, the system broke down and estimates were made deliberately higher to avoid running short of any items. Other fine-tuning required that announcements, brochures, and other associated printed matter be provided by the regional office. When changes occurred, the regional office had to prepare and reorder the printed material.

The Systems Planning Unit strategic plan had recommended that the regional offices be given a computer information system that would allow them to easily and accurately make changes in response to local conditions. Bill Kraken's presentation had shown that providing the regional offices with a relatively simple stand-alone microcomputer and software would be a cost-effective solution to the problem. During the presentation, the Systems Planning Unit had asked Bill about the implementation alternatives. Bill had replied that, as usual, the evaluation and selection of systems would take place during the systems design phase. This was how they had always done it in the past and it had been successful for them. Some of the Unit members felt unsure and the meeting continued as follows.

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"Your analysis has been excellent, Bill," said one of the Unit members, "but we are concerned because this will be one of the first times that we will be directly imposing a system on all of the regional offices. When there are changes to the system, we will have to make them at each of the regional offices as compared to a single change on our mainframe system."

"That is a good point," began Bill in his usual conciliatory manner. "I have considered that, but did not include it in my presentation because the cost estimates were in line with our usual mainframe procedures. The differences are relatively minor. Once a change is approved, we can send it to the regions on very inexpensive media. If we ever decide to network the regional offices, the changes would be even simpler."

Another Unit member responded, "That does seem reasonable and it is clear that you have really done your homework. Another concern we have is that the solution you are proposing seems to be too general in terms of the hardware and software

available. I understand what you are proposing, but my familiarity with microcomputers suggests that there are many, many combinations of hard and software that are suitable. And, they are all rather comparable in terms of cost. Are you planning to consider them all in the systems design?"

"Well, I didn't think that would be a problem," said Bill. "My past project experience has been that the number of real alternatives that met the system specifications were never very large."

"In this situation," the Unit member continued, "you are recommending a microcomputer system, a printer, and software for word processing and spreadsheets that is compatible with our mainframe. Surely you are aware that there are at least a dozen software packages that fit your specifications and at least as many hardware packages?"

"Yes, you are right," Bill said. "I just didn't think that we would need to make that decision at this point."

"No, we don't need to specify the exact components we want at this point," continued the Unit member. "But, we need to consider which of the available systems meet our organizational needs. We need to consider such things as the familiarity of the regional staff with computer systems, how reliable the components are, if they are can be easily upgraded, and the track record of the hardware and software."

"You are right," said Bill. "Some of those things we would cover in the design phase cost/benefit analysis, but we do need to investigate the things that are different from the way we design our mainframe systems. I will look into what will be required and prepare a follow-up report."

"Excellent," said a member of the Systems Planning Unit.

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Bill said to his New Project Manager, Carry Lull, "Well, that was a real session with the Systems Planning Group."

"What happened?" Carry asked.

"They were very concerned because of two things. This is the first time we would be developing a system exclusively for the regional offices and they were probably trying to get a handle on the long-term maintenance costs. Actually, this won't be much of a problem because the costs are in the same league as any of our mainframe systems. Their other big interest was in the number of alternate systems available. They pointed out, correctly, that there were literally hundreds of combinations of hardware/software packages that meet the system specifications."

"Interesting," said Carry, "I have been seeing that trend up the line too. You know that the mainframe integrated accounting/forecasting package we have been looking at is in use at over a dozen other organizations. I have been seeing more and more information systems packages on the market."

"Yes," said Bill, "I have noticed it too. I just didn't think about it until it got close to home. We probably should start including some sort of checking in our analysis phase when there will be so many possible alternatives."

1. Should the Jecorin company seek an existing information system used in another, similar organization as a solution to their problem? Why or why not?
2. Does the situation at the Jecorin company illustrate a general trend toward the development of computer information systems at a regional level to deal with regional conditions? Why or why not?
3. What is the best word processor available today on a microcomputer system? Be prepared to defend your response.
4. What are the characteristics of a state-of-the-art business microcomputer system? For example, what is the best CPU, how much RAM is desirable, how large a hard disk is necessary, and so on.
5. What is the best brand of microcomputer hardware system on the market today? Be prepared to defend your response.
6. (The above questions have been leading to this one.) How do you know what alternative hardware/software systems are available? In other words, how did you obtain your information to answer the above questions?
7. What criteria should be used to evaluate potential computer information systems that appear to be suitable for a proposed system?

Case Number 63

Workflow Reengineering

by Terry D. Lundgren, Professor, Eastern Illinois University

The Hopeman Corporation produces heavy equipment for industrial use. Their production facilities have been automated for many years and they are able to successfully compete on the international market. Hopeman places much emphasis on their excellent Information Systems Division (ISD) for the development and maintenance of the computer information systems used in the production area. The ISD has been well supported in terms of personnel and budget and they enjoy considerable status at Hopeman.

The success of the Information Systems Division in the production area has prompted the Administrative Services (AS) department to review their operations. Ann Inman, the director of AS, has been reviewing a recent department audit. A comparison shows that last year's audit was remarkably similar though costs have crept up slightly while the speed and accuracy of their services have slightly declined. Ann spent some time putting a ten-year audit history together of AS and found a discouraging pattern of increasing costs and decreasing productivity. She has been reading about business process redesign and feels that this idea might be applied to AS, so she called the ISD and asked for their support. ISD assigned John Jackson, a senior systems analyst, to look over the situation in AS.

John calls Ann and sets up a meeting to discuss the problem. At this meeting, John begins by explaining that ISD is interested in business process redesign, but that they have not incorporated the process into their operations at this time.

"We were wondering if you would like to be our test case," John asked Ann. "We could not only work on your problem, but see if the process will be feasible for us to use in other areas."

"That would be fine with me," replied Ann. "How do we proceed?"

"To start, give me an overview of your situation." said John.

"We want to reengineer our document workflow," Ann began. "I believe that we have accumulated a lot of little inefficiencies that are adding up to a major cost sink. The problem is that we can't see the big picture. We keep trying to make little fixes that save a little here and a little there, but our costs continue to rise while our productivity goes down."

"I see," John responded. "You want to analyze the entire system and reengineer it to make the flow logically efficient."

"Exactly. I suspect that there are a number of components that can be completely eliminated. We have been adding computer support piecemeal to our operations, but the way we do things has changed very little over many years."

"I know what you mean," John replied. "I have been involved in some of the changes where you added some spreadsheet templates and some of the word processing components."

"Yes, I remember those," said Ann. "We added computer support, but we didn't change the basic processes. If we continue doing that, we will be able to just about stay even with the game. But we need to make a jump here."

"You are right," John agreed. "I'll get started with the development of a model of the existing system to see where we stand. This will be a rough model because we don't want to spend too much time on a system that we want to replace. Then, I'll develop some alternatives in conjunction with you and any others you feel should be involved."

Ann began a shotgun of questions. "How long will this take? How much will it cost? Will our department be billed? What are the deliverables? What can we expect?..."

"Whoa," John laughed. "We have a very standard procedure for our regular IS projects that starts with a preliminary investigation. Actually, it would all normally start with you completing an Information Systems Request form. But you wouldn't be

familiar with our methods because all of the ISD contact with AS has been as an adjunct to a production IS project, like the spreadsheet and word processing changes. So, I'll be working through our standard procedures and seeing how they apply in this situation."

"I see," Ann said. "We will be developing the standards for similar future projects as we work through this one."

"Yes, and ISD will provide my services on our trial budget. Normally, we would follow our preliminary investigation step now. I will keep you fully informed and send you a copy of all of the documentation that is produced. Anything that you don't feel comfortable with, give me a call and we'll straighten it out."

"That sounds very reasonable," Ann replied. "what is the next immediate step and what should I plan for?"

"I will do some data collection and put together a model of the existing system. That will take about a week, so we should schedule a meeting next week with the people you want to be involved and I will make a presentation of the model."

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"Here is an essential model I've put together based on your existing document workflow," John said to the group at the table. "This shows the sources, destinations, the documents and forms, and the processes that are involved. You can see that the system begins with the customer symbol at upper left and generally works from left to right. Take a minute to look this over and see if it all seems correct."

"I have a question," said Paul. "There are four people who do the initial customer validation, but there is only one process for this on the diagram."

"Good question," said John. "The reason is that this model does not contain references to physical things like people, places, and equipment. This is called a logical or essential model because it contains only the abstract symbols instead of specific references. So even if more than one person does an operation, the operation is shown just once as a process."

"I understand," said Paul. "What is the point of doing that? Won't we have to specify the physical things to put the system into operation?"

"Absolutely," John replied. "The idea is to first develop a model that is logically correct without specific referents. This makes it easier to envision what you want the system to accomplish and to minimize the limitations imposed by the way the existing system actually works. We will work with this system until we get it the way we want and then we'll develop the implementation model by adding the ways to put it into operation, like multiple stations for a process."

There is much discussion after this concerning the omission of a process in the existing system. After much consideration, they all agree that the process is logically unnecessary and really should be included as elements in two other processes. A lot of discussion centers around the fact that the existing system does work well and that no one is deliberately trying to sabotage it by adding unneeded processes.

"Well, are there any other questions you have for John?" asks Ann as the meeting draws to an end. When no one responds, she says, "Well John, how did it go? Are we in a position to continue?"

"It went great," John replies. "I will incorporate the changes you have suggested into some alternatives and run them by you again. We can then select the model that looks the best and begin to look into the implementation details. Now that you know how this type of meeting goes, they will go more smoothly in the future."

As the group leaves the meeting room, they chuckle and comment to each other about the prospects of future meetings and that perhaps "smoothly" is not exactly the right word.

John thinks to himself that the tone is very positive compared to some of the IS projects he has worked on in the production area and that the people in this group seem more amenable and interested in departmental goals.

1. Do you think that organizations should be concerned that we often add computer support to outdated and inefficient business processes so that we end up with a computer information system that makes the same old mistakes? Discuss.
2. Discuss an alternate approach to the Hopeman AS problem where the analysis first produces a complete and detailed model of the current system as it presently operates (the physical system) and then abstracts that system to produce an ideal logical system.
3. In what ways can reengineering cause people problems? Consider the effect when it is pointed out that a process is contributing little or no value to a system.
4. What questions should come up in terms of systems and subsystems when developing a system model for the Hopeman AS department?
5. Workflow systems are designed to work with the flow of documents in electronic formats. Will workflow systems lead to the paperless office? Discuss.
6. The Hopeman ISD is willing to incorporate business process redesign operations into its charter. Do you foresee any problems with other areas viewing this as another "empire-building bid by the computer people"? Discuss.

Case Number 64

Talent and Discipline

By Terry D. Lundgren, Professor, Eastern Illinois University

Bill Sammond, a systems analyst at Fortune Life and Casualty, had just returned from lunch. He was involved with a project team to install a new system to add a complete annuity line to their products. The new annuity system was a complete purchased package that was fully documented, tested, and in use at a number of other insurance companies. The annuity products in the new system needed only some slight adjustments to fit the line of Fortune's proposed annuities. Then the package had to be integrated with the present company system. The project team had been able to move quickly through the analysis stage and was now beginning the design stage. They estimated that only 12 to 13 weeks would be required to complete the design stage for the integration of the 132 program modules of the new annuity system with their present life and casualty system.

Bill was pondering the development of a systems diagram for the annuity project that would be consistent with the larger company system when he received a call from Sally Vitale in the Actuarial Department. Bill knew Sally from the lunch crowd that met regularly at the Steak House across the street.

"Bill, we need some advice over here," Sally said. "One of our programs is giving us fits. Could you come over this afternoon for a few minutes?"

"Sure," Bill responded, "I'll be in that area about 3. How will that be?"

"O.K., great." said Sally. "See you at 3."

Bill glanced at the clock and figured he could finish roughing out the systems diagram and then stop by and see Sally in Actuarial on his way to the Computer Operations Department.

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When Bill arrived in the Actuarial department, Sally was anxiously waiting for him. "Am I glad to see you, let me introduce you to Peter Wilson" Sally said, gesturing to the man next to her. "Let's sit down over here and I'll explain the situation." As they sat down, Sally continued, "Pete is studying to be an actuary while he works in the department and he is also a skilled programmer. Last year he wrote a program we use on the office microcomputer to do some complex actuarial calculations. It is really useful and has saved us a lot of time."

Bill remembered that Actuarial had purchased a state-of-the-art microcomputer for their office last year. Information Systems had asked if they wanted their involvement and the actuaries had declined since they had no plans for ever connecting with the company mainframes. They said it would only be used in our offices for internal actuarial work. Information Systems had approved the purchase of the hardware and software under those conditions. Bill recalled that they had bought the Pascal programming language and had wondered why because the Fortune Life and Casualty Information Systems department had clearly stated that only COBOL, assembly language, and C would be supported.

Pete continued Sally's explanation, "The problem is the new annuity package. We have the series of different annuities that will be offered and we want to integrate them into our actuarial program. I included the code that I thought would do the job, and it seemed to work at first. Then we caught an error and a suspicious figure on one of the reports it prints out. Now, we aren't sure if any of the output is correct."

Sally broke in, "I knew that you were an analyst in Information Systems and that you were working on the new annuity project, so I thought you could advise us on how to proceed. How are you going to integrate and test the new annuity system?"

The implications of the question momentarily stunned Bill. Because of how his department worked, no one would ever need to ask that question. Thinking how to summarize such a complicated topic, Bill answered, "Well, we use a structured methodology that emphasizes a top-down modular approach. This means that the program modules have been constructed to be rela-

tively independent and this makes the testing process pretty straightforward. The new annuity system was purchased as a complete package and it followed a similar approach so we won't have much testing to do. We will test the integrated package and we have the annuity system results that came with the package for comparison."

"I see," said Sally. "Well, what do you think that we should do?"

Bill responded, "Well, you should start with the original system flowchart or program flowchart or whatever document you have that shows the structure of your program."

"I brought the program source code," Pete said, laying a thick series of pages on the table and pushing it over to Bill. "Because this is Pascal, it is inherently structured. Actually, the program is composed of many distinct procedures so that the structure is very clear."

Bill looked over the program code. Although he was not familiar with Pascal, it was clear that this was one very large, very complex program. "This is a complex program," he said to Pete. "You're obviously a talented programmer. How did you write it?"

Beaming, Pete replied, "It took weeks. I just sat down and began writing the code. Every once in a while, I tested it with some known data. I never thought it would turn out to be so large. In fact, now that I look at it, there are some procedures that I don't remember very well and I'm not exactly sure what they do. When I tried to just add in a few more procedures for the new annuity system, it started to act erratically."

When Pete paused, Sally said to Bill, "You have mentioned how you have testing procedures and ways to add the new annuity modules efficiently to our existing system. Can't we use similar methods here?"

"I'm afraid you can't," said Bill. "Our testing depends on the fact that we follow a structured methodology that breaks down all programs into small modules. We keep diagrams of how the modules are related and what they input and output. If we add modules, we first tie them into the larger system according to the documentation. You don't have any documentation and I don't see any way to modularize this program," he said pointing to the stack of paper.

"Do you mean," Pete asked, "that no one in your department ever sits down and just writes a program?"

"Absolutely not," Bill replied. "We all have studied and follow formal development techniques and we use a structured methodology. One of the reasons we use a structured approach is to avoid the exact problem that you are encountering."

Sally was not happy as she said, "What should we do at this point to cut our losses? We have wasted too many valuable hours messing with this program." Pete nodded agreement.

"I see only one reasonable long-run option in this situation," said Bill. "Since this is likely to occur again in the future, you should move toward a structured approach now. Start by making a flowchart of this program. It doesn't have to be rigorous, but you need to structure what you are doing and create documentation for later maintenance. Just doing this will change the way you view your program code. Then modify or even completely rewrite the program if necessary to conform to the flowchart. I realize that this will take some time, but the payback will be worth it in the future. When I get back to my office, I'll send you some basic information for using a structured approach and you can decide how far you want to go."

"Thanks for coming over," Sally said to Bill. "I had hoped for some clever miracle that you people in Information Systems kept hidden. But, I see your point. See you tomorrow at lunch."

1. Should Bill have volunteered the services of the Information Systems department to help the Actuarial department with their problem? Should the Information Systems department take over this application and make it work for Actuarial? Why or why not?
2. How much does program size affect the ability to test effectively? Is there any good reason to limit a program's size?
3. Suppose the Actuarial department returns to the original version of their Pascal program, which works fine. Then they let Pete code an entirely new program just for the new annuity system. This saves them some time compared to Bill's suggestion. What are the consequences of this decision?
4. Consider a small office with only one or two microcomputers with standard word processing and spreadsheet applications. If a special program is needed and written by the office staff and the program works, is there really a need for program documentation and program flowcharts if the program works?

Case Number 65

Computer-Assisted Systems Engineering

By Terry D. Lundgren, Professor, Eastern Illinois University

General Apparel Inc. has continually kept up with the state-of-the-art in information systems technology. The Information Systems Group recently installed a comprehensive CASE (Computer-Assisted Systems Engineering) which includes an excellent project management module. Installation of the CASE and appropriate training for the personnel took over six months and management was concerned that the system would be productive. The Systems Review Committee carefully deliberated on the possible projects to be used with the new CASE to find one that would be representative. The New Projects Manager selected experienced information systems professionals for the project team.

The new billing system was selected as the first CASE project with Joan Kaball as the project manager and leader. As the project was nearing completion, she met with Keith Fraken whom she had worked with on previous projects. They met over a working lunch to discuss the benefits and disadvantages of the new CASE.

"So, how is the billing system going?" asked Keith. "I notice that you have a chance of meeting the project time frame... unlike many of our previous projects.

"Yes," Joan replied, "and our new CASE software has really made a difference. The project management reports have really been invaluable."

"Tell me some specifics," said Keith, "exactly how has the CASE been useful. You know how much time and money we have invested in it."

"Well," Joan said, "first, the users started the usual also-do's as after we had completed the analysis stage. They wanted to add another report and they wanted to change the input screens. So I entered the proposed changes in the CASE and generated reports of the new schedule that showed that 20 additional days would be needed to incorporate the changes. When I showed the reports to the users at the User Review meeting, they agreed to wait on the report. And they understood that the input screen changes were not free. Best, the Systems Review Committee accepted everything when I explained how we had proceeded."

"Impressive," said Keith, "getting the Review Committee to see the situation can be difficult."

"That is true," said Joan. "Another area that was really changed was in the design of the new system. You remember how long it took to get our DFD's (Data Flow Diagrams) to the final drawings? Well, it only took us one-fourth the time with the drawing tools in the CASE. And when we did make a change in the system, instead of the typical process with editing, erasing, and squeezing in new objects, the CASE redrew the entire set of leveled DFD's in seconds."

"That would save a lot of time," replied Keith. "What did you do when we received the announcement that we were changing our terminals? No one knew about that. I know that your input screen designs had to be changed because of the new terminals. That must have thrown your project schedule for a loop."

"Yes, it did," Joan said thoughtfully. "Our first estimate was that the changes would take ten days, but most of the activities affected were not on the critical path. So, I tried some "what-ifs" on the CASE to see how resources and activities could be juggled and came up with a revised schedule for the project that only delayed us two days and didn't use any additional resources. The ability to try different scenarios turned out to really valuable when I first noticed that almost all of the activities were falling just a bit behind schedule. After some investigation, I was sure that almost all of the original time estimates were too low. Not by much—just a few extra hours here, and a few extra hours there. You know how it goes."

"I sure do," said Keith. "I remember the Policy Records project. We just kept falling behind a little at a time until we were really stuck. I kept thinking that we would hit some activities where we could make up some time, but it never happened. We even cut some activities and we still finished badly over schedule. Everyone was dissatisfied."

"Well, I anticipated a similar disaster, so before we had gone too far, I used the CASE to kick up all of the time estimates by 10 percent and then to give me some options on meeting the original project finish date. I found two options. One option let me meet the original time if I added a programmer for two days, and the other option kept all of the same resources, but added three days. The Systems Review Committee decided to go with the original date and they assigned me the programmer."

"That is good planning," said Keith, "and it enhanced your credibility with the Review Committee. That will be money in the bank for future projects. The new CASE has really helped you a lot. I was wondering what up-front work is required. How much time do you need to spend getting the project set up with the CASE?"

"If you don't count our initial training," answered Joan, "then it didn't add any appreciable time to the project. I had to break out the activities, assign resources, and make time and cost estimates just as we did with the manual paper system, but instead of writing it on the old forms, I just entered it all into the CASE screens. In fact, the initial training will be completely recovered after just this one project for our team because of the really decreased time we spend editing and redrawing our documents. There are probably a lot of other subtle benefits too that we won't notice until the CASE has been in use for a while."

Intrigued, Keith asked: "What kinds of subtle benefits? Do you mean like the really nice DFD's that are easy to read? Or the ability to link old projects to current ones?"

"I wasn't thinking of those specifically," said Joan, "but that is the idea. I was thinking about the benefits of increased communication among the team members through the common data dictionary. All of the team members can access the same information from their terminals. I'm not sure how much time this will save, but I noticed that we really reduced the questions at our weekly meetings that had to do with what each person was doing. For example if a user wanted to see one of the prototype input screens, they could bring it up on their terminal and see the latest version."

"I see what you mean," said Keith, "it would be hard to really measure that sort of thing, but it could add up in terms of time and energy saved. What do you think will be the result of CASE on the project generally?"

"I am betting that we can complete the project within our present projected time frame and within the estimated budget. Even if the usual unanticipated events occur along with all of the usual project problems, the CASE will allow us to make informed decisions that will keep everyone informed with no surprises. I was a bit skeptical when we got the CASE because of the cost and the training we had to go through to learn to use it, but I'm a true believer now."

"I think that I am moving that way too," agreed Keith. "What do you see as the next step?"

"You know that we have a lot of really old systems with little documentation," Joan said. "Many of them are full of spaghetti code COBOL programs that are difficult and time consuming to maintain. I understand that we are thinking of getting a restructuring module for the CASE that will take that old program code and document the standard control structures, and standardize the variable names and data models. This would reduce the maintenance time while preserving the program functions. And if that works well," Joan enthusiastically continued, " we can add the reverse engineering and reengineering modules. They have the potential to simplify and streamline our programs to make them more efficient and reliable."

"That would be a real step forward," Keith acknowledged. "That was a good lunch Joan, I'm really glad I talked to you about the CASE. Let's do it again so I can keep informed on your progress. Well, back to the trenches."

1. If a Fortune 500 company is considering a CASE product for their information systems division, what is the first step they should take?
2. Do you think that time estimates of SDLC (Systems Development Life Cycle) activities would be fairly accurate, consistently low, usually high, or just not very reliable?
3. Do you think that CASE could effectively replace a systems analyst?
4. Some companies have purchased CASE and after two to three years have yet to see the benefits. What might be the problem?
5. Comprehensive CASE products include a project management module. How important is it to integrate project management with CASE?
6. What elements of analysis and design in the SDLC could never be replaced with a CASE module?

Case Number 66

Joint Application Development

By Terry D. Lundgren, Professor, Eastern Illinois University

Jim Dalby, the New Projects Manager for ACME Financial Corporation, is very concerned with one of the new projects for bringing policy records online. This project is planning to change the policy records department from a manual, paper-based operation to a computerized, image-based system. Susan Johnson is the project manager and the project has apparently become bogged down in the systems design phase.

The computerization of policy records is part of a larger company effort to enter the computer information system age. ACME had been long involved in systems work and they had in place an efficient, structured methodology with an accompanying project management package. This made it all the more puzzling to Jim when he reviewed the weekly project reports and saw that the policy records project had fallen seriously behind schedule early in the project. He immediately called Susan and arranged for a meeting.

Susan entered Jim's office with some trepidation. She had been working for ACME in the systems department for many years without any problems. She had started as a programmer and had moved up in the ranks to systems analyst, and about two years ago to project manager. Her last project went reasonably well, and she had no reason to expect that this project would be different. The other analysts on the project team were competent, and she had been very conservative with her activity time estimates. So went Susan's thoughts as she began the meeting with Jim.

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"Well," Jim said, "I've been reviewing your last project report, and you are clearly behind schedule. From your comments, I don't see how you can make up the lost time, and you haven't requested an extension from the Systems Review Committee. I was wondering what your plans were..."

After a thoughtful pause, Susan replied, "I'm glad you set up this meeting since I really need some advice. I've been trying to figure out what the problem is on the project and why we are falling behind. After some investigation, it seems to be centered on our new policy input module."

"Yes, I have seen your reports and I remember that module," said Jim. "Isn't that where the users scan in the paper documents and store them on optical disk?"

"Yes," answered Susan, "it seemed straightforward at the time, but every time we set up the screens for the users, they demand another round of changes. I've been tempted to tell them to like it or lump it."

"I know the feeling," sympathized Jim. "Do you think that they are just being obtuse? Do they seem committed to the project? What do you think is needed?"

"I'm not sure," Susan replied. "They may not be very committed to the project, but they do seem to understand what we are doing and they are trying to help. Frankly, I don't think that they know what they need. I think that each round of meetings gives them more ideas of what the system is capable of doing, so they want more features. Unfortunately, I don't see any end in sight."

"Can you have one of your analysts show them a system that has all of the possible features and explain that if they want it all, it will cost them so many more months of project time?

"No," said Susan sadly, "none of our analysts have enough experience with policy records to understand the details of the way that they work. Every time we think that we have it figured out, the users point out other changes. And the changes are logical. Of course, the users don't seem to relate the connection between this delay and the delay of the total project.

"I know what you are dealing with," said Jim, "but you know that unless the users are satisfied, there is little chance that your project will be successful. I've been reading about JAD and one of our regular consultants now has a JAD package. Would you like to try it?" he asked Susan.

"I've heard about that too," Susan said, "isn't that the joint application development idea? Where the analysts and users get together with some prototyping software and equipment and they stay in the meeting until they settle on a model?"

"Yes," answered Jim, "and our consultant will give us an introductory price to try it out. He wants us to buy a regular contract so that his firm can provide JAD sessions whenever we need them. To do it right, we need a special room set up with the software and hardware equipment. The consultant's firm has a room at their offices that we can use for the introductory session and it is only a few minutes from here. What do you think?"

Susan thought it over briefly and responded with "That could solve my problem and get us back on schedule with only a little delay. Could we schedule the meeting room next week?"

"I will check," said Jim, "and get back to you right away. As I understand it, you schedule the room by the day or by multiple days, since they expect it might take you that long to get it settled. Do you think it will take longer than a day to resolve your problem?

"No, I think that a day should do it. I will do some up-front work and get everyone ready so that we all know exactly what needs to be accomplished. If we can get a fast turnaround on the screen models, then we can easily reach a consensus within a day. If this works, we will have lost a day from the project schedule, but it will be worth it."

"Fine, I will schedule the room if it is available for next week," said Jim.

The room was available and scheduled. Susan set up the meeting with the team analysts and users and she prepared an initial set of materials for everyone to have a day before the session.

"How did the JAD go?" Jim asked Susan.

"Great," she said, "we accomplished everything by 3 o'clock! Everyone is satisfied with the results. The users like the final screens and the analysts say that it can be done without changing our original time estimates, though the total project time will be delayed because I didn't get the problem fixed when it occurred. If we had done this earlier, the project wouldn't have gotten behind schedule at all."

"Would you recommend that we purchase a JAD contract?" asked Jim.

"Yes," Susan quickly replied, "but that is from my perspective. In fact, if we had a JAD room here, I would use it on all of my projects. Even so, that means that I would only use it a couple of times a year. But there is no question that it proved its value in this case. We saved at least a person-month from that one JAD session."

1. It has been observed that sometimes users do not really seem to know what they need in a computer information system. Do you think that this is true? Discuss.
2. If a project team's analysts and users are not getting along well, could an all-day session doing JAD cause even greater problems? Discuss.
3. What do you think it costs to rent a JAD room for a day? Because of the real variability of the answer, explain what your cost estimates are based upon.
4. Obviously, a JAD session can rapidly produce prototypes for evaluation. In what other ways might a JAD session be useful in the SDLC?
5. Would it be feasible to use an extended JAD session of perhaps a week or two for all of the systems analysis, design,

Case Number 67

The Value of Systems Analysis

by Terry D. Lundgren, Professor, Eastern Illinois University

Acme Pipe and Cable have 32 regional offices in 14 states. The corporate headquarters in Grand Junction, Colorado, have been steadily losing the paper war. Each month there is an ever increasing pile of invoices, purchase requests, sales slips, and requisitions. Requests and information arrive and are recorded, checked and cataloged, approved, ordered, filed, and eventually verified. At any time, about 250-300 files are open waiting for resolution. During a normal day, about 35 open files are resolved and about the same number of new files are created. There are about 25 people from clerks to managers who are involved with the paperwork.

Acme has never had an Information Systems department. There are currently about 125 386- and 486-based PC's at the corporate headquarters running popular word processing, spreadsheet, and specialized applications. About 30 of the PC's are linked in a standard network which shares some common databases and printers. The network and software are maintained by a Support Specialist who has grown with the company. Two business analysts function as systems analysts.

Fred Gramble, an Associate Vice-President, has become increasingly concerned with the paperwork problem. Some of his work has been seriously delayed because the associated files could not be easily located and were incomplete. Fred has asked Geri France, one of the Business Analysts, to look into the problem. Geri begins by setting up an appointment with Fred in his office to discuss the situation. She begins the meeting by asking Fred, "What do you see as the primary problem?"

Fred responds, "Well, we have too many open paper files that are impossible to track. I don't know the status of any of the files until they are resolved. I do know that we have about two or three hundred open files at any time. Last week, it took over three hours to find out who had a file that I really needed; the time delay cost us an account that is worth a lot."

"That is something we must deal with." agreed Geri.

"Good," Fred said, "find out how we can deal effectively with this problem."

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Geri investigates the situation and identifies a number of solutions. She sets up a meeting with Fred to tell him about the possibilities.

"Well, Fred," Geri begins, "I have researched the situation and received some possible solutions to the situation. But there is little consensus on how to proceed."

"That is interesting," Fred observes, "I have been unable to think of any decisive course of action either. Tell me what you have found out."

Geri summarizes her results with the following points:

- We could use one of the form-based systems that also includes workflow support. Forms can be filled in and sent to the next person in the processing chain. A tracking module maintains a database of all forms in progress and can report on the current status and location of any form.

- A good e-mail system was suggested. Regular and efficient communications would significantly enhance the processing of the files. In addition, a module that also allowed group conferences might prove useful. This would really help process a file more quickly as compared to passing it to each of the required people.

"Either or both of the above solutions would require some degree of additional networking," Geri concluded.

"Those do sound promising;" said Fred. "Who would have to be networked? About how much would it cost? Will these solutions work with our DOS, Windows, and our Macintosh systems? Can we use our existing dBASE files?"

"Well, to answer those questions," Geri said, "we would need to move into the analysis stage for this project. If you give the approval to go ahead, I can start."

"Well," Fred said thoughtfully, "I'm not sure we are ready to make a serious commitment yet since we don't know for sure what we want to do."

"Yes," Geri agreed, "we may not even know for sure what the problem is. I also went to one of the large information systems (IS) consulting firms. After hearing my description of the situation, they said that the problem isn't sufficiently well defined to start throwing technology at it. They suggested that we do a preliminary investigation to determine the scope of the problem and then look at some solutions for feasibility."

"That sounds reasonable."

Geri continued, "They also suggested that the cost of a preliminary analysis would run in the neighborhood of from $10,000 to $40,000 and would take from two weeks to two months."

"That is an expensive venture."

"Their point," Geri explained, "is that money and resources spent now to determine exactly what needs to be done will save money in the long run. For example, they said that a forms solution could be the answer, but it may prove to be using a steamroller to kill a fly."

"Yes," said Fred, "I see the point. Geri, I want you to do two things. First, set up a plan for including a preliminary investigation in our systems development life cycle. And second, do a preliminary investigation for this files problem."

"I will start on that," said Geri. "You know, since we have never really done this before, perhaps we should get one of the IS consulting firms to do a preliminary investigation. We can get that done and also observe how the process is carried out."

"Excellent idea, Geri. I will put the paperwork into the mill for approval. This should have a long-term benefit for us."

1. What exactly is the problem at Acme Pipe and Cable?
2. Which alternative seems to be the best answer to their problem? What data would you want to be able to answer this question more accurately?
3. Is it time for ACME to and start an Information Systems department? Why or why not?
4. To what extent should possible solutions be investigated in a preliminary investigation? (The answer to this question has not been resolved by experts in the field!)

Case Number 68

Into The Information Age

By Terry D. Lundgren, Professor, Eastern Illinois University

Bill Johnson and Marc Rolle of J & R Manufacturing thought that it was time to really enter the computer age. J & R produced rebuilt automobile parts in a market with a steady demand. Over the past twenty years, the business has continued its slow but steady growth. They obtain used automobile parts from salvagers, rebuild those that are consistent with automotive standards, and then market the parts through distributors. Rebuilt automotive components can provide a significant savings with quality equivalent to new parts. In addition, replacement parts for older vehicles may only be available through the rebuilt market.

J & R Manufacturing consists of the production area and the business office area. The production area contains the workers who inspect incoming parts and refurbish those that are rebuildable. Some workers are dedicated to inventory movement by accepting incoming parts, routing them to the rebuilders, restocking them after refurbishing, and putting together orders for distributors. The business office consists of employees who take care of incoming shipments, sales to distributors, reception, payroll, inventory, billing and all of the other operations needed by a small manufacturing firm. In addition to a typewriter, a two-line telephone system, and a copier, there are two microcomputers in the office.

One of the microcomputers in the office is a mid-80's model with 1980's software that is connected to an equally old daisy wheel printer. This system is used for word processing activities such as inventory reports, preparing billing, requesting payment for late bills, and the occasional correspondence letter. Though very slow by current standards, the system works without error and the output is of acceptable quality. The other microcomputer system was recently purchased and is relatively state of the art with a fast processor, large storage capacity, and a laser printer. This system is used by the office financial person, Chris, for various financial operations. Chris uses word processing, spreadsheets, and has dabbled in database applications. Chris has established herself as the resident computer expert.

Bill and Marc wanted to significantly upgrade the use of computers in the office, so they approached Chris as the computer expert. "We want to do more with computers in the office," Bill said, "What do you think we should do?"

"Well," Chris answered, "first, we should update the old microcomputer. It should be upgraded to run faster and more productively. It should get a faster processor, more RAM, and a larger hard disk. We could upgrade it for about $2000. Or we could replace it with a completely new model."

"$2000 is quite a bit of money," Marc said, "let's think about it for a while." Everyone agreed that seemed reasonable. Chris mentioned that an upgrade of that level would speed up the entire system by at least a factor of three. Since the system was used about 20 hours per week, Marc calculated that an upgrade would save them 7 hours per week or the equivalent of one entire day.

Later that week, when Marc was out shopping at the local electronics discount house for a camcorder, he saw a deal for a complete state-of-the-art microcomputer system that included everything (microcomputer, printer, supplies, and software) for a very attractive price. He thought that this would be ideal for the office so he purchased it and arranged delivery for the next working day.

The system arrived and was placed in the office. It did not get unpacked for a week. Marc went into the office and asked Chris "Why hasn't the new system been put in place of the old one?"

"I haven't had time," Chris answered, "and the other staff are not very computer literate, nor particularly interested. You know, the old system works O.K."

Irritated, Marc instructed Chris to take time to get the new system installed to replace the outdated microcomputer and printer. Chris arranged to have the new system unpacked and set up. When she turned it on, the screen message reported that all was well and invited her to go through a tutorial. She did and was pleasantly surprise how informative it was and resolved to have the other office staff do the tutorial too.

With the system up and running, Chris installed the old software and files from the old machine. Everything seemed to work, but when they tried to print the inventory report, the new system would not print correctly. Chris had her own work, so she reported the problem to Marc. Marc had no idea what the problem was, so he told Bill that they needed some professional help. Bill agreed and they asked a computer consultant to come in.

The computer consultant arrived and quickly assessed the problem. "You don't have the correct printer driver for this printer. The software application provides the printer driver and your version of the software does not have the correct driver. Unfortunately, that software company has been out of business for some years. I could write a custom printer driver for you, but it will cost you more than the entire system."

"Well," Marc asked, "Could we upgrade to another software program that had the correct printer driver or could we use the old printer?"

"Yes," the consultant answered, "you can upgrade to a number of programs, but it is likely that you would have some conversion problems with your data files. On the other hand, you could use your old printer, but that just about negates any speed advantage of the new hardware. And you will eventually have a similar problem with that printer since parts are no longer available for it."

As a result of the consultant's visit, Marc, Bill, and Chris had a meeting to decide what to do. So far, the new system was worthless. Fortunately, the old system had not been removed and was still in service. They knew that buying new software would mean that some time would have to be allocated to installing and learning the new programs. But before that, some time needed to be spent determining what software to buy that would do what they wanted.

"If we get new software," Bill asked, "couldn't it do more than simply duplicate the old system? I know it will be faster, but can't we do more operations too?"

"You bet," answered Chris, "some of the new applications can really increase our capabilities. We could even network the new system with my system so that all of the data files can be easily shared."

Marc, getting caught up in the enthusiasm said: "We could use the old system for jobs that are not time critical like the weekly inventory report. Then the new system could be used for our immediate correspondence and billing. I wonder if we could do some scheduling to set up our delivery and pickup times more efficiently?"

"You are right on that, Marc," said Bill, "if we could tie the inventory to the scheduling, we would know when the rebuilt parts are available for delivery instead of going through all of the sheets every day. And if that information were linked to our pickup list, we could save a lot of duplicated routes!"

Everyone agreed that much more could be done with computers. So they decided to keep the old system running for now and to get new software for the new system.

1. What do you think is going to happen next to J & R Manufacturing? What are the chances that their plans will be realized? What will be the agenda of the next meeting of Marc, Bill, and Chris?
2. Are the expectations for the proposed computer system unreasonable? Can microcomputers perform the tasks suggested by Marc, Bill, and Chris?
3. Should Marc have purchased the microcomputer system at the discount electronic store? Did he get a bad deal? Did the system perform unsatisfactorily?
4. What should J & R do now? If you were called to give them advice, what would you tell them?
5. If you could intervene at the beginning of this case, what would you tell J & R to do?

Case Number 69

Lakes Start—Project Management

by Bridget N. O'Connor, Associate Professor, Business Education, New York University

As an independent systems consultant, you have just been hired to assume temporary project management responsibilities for a Strategic Marketing System (SMS) project currently in progress at the Lakes Start Corporation. Your predecessor as project manager, Glenn Uyekawa, had to take an emergency leave of absence (with expected duration unknown) due to his father having a serious accident during a visit to his native Japan.

While Monday, May 8, is to be your first day on the job, you come in on Saturday morning to "bring yourself up to speed" on the project. The administrative offices are deserted, although there are some order entry personnel working in the telephone order center. On your desk are the following documents; with a highlight pen, you mark significant points from each document (found in italics):

- A brief note to "whom it may concern" from Glenn, who had made the following observation to his successor:

  Times are good for Lakes Start—sales are up; morale is high; and the once tightly-held family-run company is getting ready to go public! Despite the run on good news, the President, in her state of the organization address, warned us of the "problems of good times," and read the corporate philosophy statement! It's imperative that our system support the goals of the company!

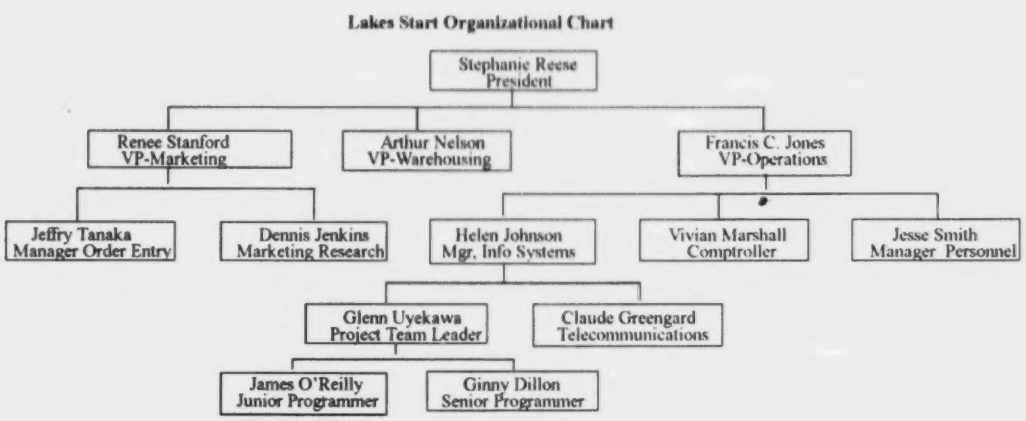
- Lakes Start's Corporate Philosophy Statement

Employees involved in innovation in the service of customer satisfaction

At Lakes Start, we believe in providing the highest possible value of outdoor and recreational clothing to our customers at a reasonable price. Included in our concept of value is the quality of the material and construction of our merchandise, its design, and a high standard of customer service. Operating solely as a mail and telephone-order firm enables us to operate significantly more efficiently than many of our conventional retail competitors, but also requires that we be very sensitive to the needs and concerns of our customers. We fully guarantee not just our merchandise, but the customer's satisfaction with it. The success of a mail and telephone order business is built on a foundation of customer satisfaction—that foundation is our most valuable asset. At Lakes Start, innovation is every employee's most important responsibility.

- An organization chart of "key players" in the Lakes Start Corporation and its Information

Systems (I/S) group:



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- Post-It Note from Glenn to check a voice mail recording from Francis C. Jones, vp—operations (voice text follows):

What we need here is a system that will allow us to immediately screen first time callers from repeat callers. When a customer is new, an order taker should be able to create a new customer file. When a customer is a repeat orderer, an order taker should be able to ask for a customer ID number and immediately call up the customer file with mailing address, phone number, and other information on it so that it doesn't have to be rekeyed. Then, this whole file needs to be seamlessly transferred to billing and shipping. We need this system up and running now!

- Memo from Renee Stanford, vp-marketing

Some of the most interesting facts about our customer base emerge when we consider where they live. Usually, we consider customers as "repeat customers" (someone who has ordered twice in the past year) or "single-time customers." What we want is a system that will tell us if there is a relationship between repeat customers and specific geographic areas and/or specific categories of products. If we can find this out, we'll be able to strategically market!

- Memo from Vivian Marshall, Comptroller

Glenn, don't forget we have a budget! And while you are working on the new system, keep in mind that there are a lot of overdue accounts out there! It seems some customers just aren't paying their bills! And Art says that some products are selling better in some geographic areas than others. Can you help us pinpoint this information?

- Print-out of email message from Stephanie Reese, President

Say, Glenn, why not add an Internet component to this project? Over the weekend I attended a seminar on HTML; on-line commerce is the way this company should go!

You rub your eyes after perusing the materials. Suddenly you realize the project isn't quite as simple as you had been led to believe. Everyone has a different vision of what the project is to look like and do!

You decide to look over these materials and make an action list for yourself. You ask yourself how the company can foster an innovative spirit through a new system. Your action list should:

1. Enumerate and list the issues, concerns, or tasks that need to be addressed in the coming weeks.
2. Identify who should be involved in the resolution of these issues, concerns, or tasks.
3. Develop strategies for involving others in this resolution (e.g., focus groups, task forces), and their responsibilities toward the project—will they simply be informed, have the right to approve the resolution, be part of a task team, coordinate activities, and the like.

Case Number 70

Sampling Required

by Terry D. Lundgren, Professor, Eastern Illinois University

The National AutoService Company has been in business over 50 years with modest, though steady growth. They pride themselves on being state-of-the-art and have had an information systems (IS) department at the corporate headquarters in Dallas, Texas, for a number of years. All of the major components of the corporate headquarters have a computer information system and most of them are fully integrated with each other. IS is concerned with maintenance and fine-tuning of existing systems, fully integrating all systems, and the development of new systems. They have just started to put a systems plan into effect with a Systems Planning Group which incorporates the previous Systems Review Committee.

National AutoService has 2,513 regional outlets from coast to coast. About half of the outlets are owned by the company and managed by a company administrator and the other half are franchise operations owned and operated by the franchisee. The outlets are retail stores that primarily sell tires and some associated services such as wheel balancing, brakes, and alignments. The retail stores are not large; they typically have a manager (owner or administrator) and fewer than ten employees. The manager maintains all of the paper records for accounting, payroll, and customer scheduling. All supplies and inventory are ordered through the corporate offices which send the regional offices monthly summaries and reports.

The Systems Planning Group has recommended that an information system be developed to link all of the regional offices to the corporate office. The proposed system would have a permanent linkage and the corporate mainframe would provide for the regional outlet's accounting, payroll, customer scheduling and more. The benefit would be a standard, approved series of program modules being used for almost all of the regional office administrative functions.

Gheani Hon is the systems analyst assigned to the project. Gheani did the preliminary investigation and presentation of results to the Systems Planning Group. The project has been enthusiastically endorsed and is moving into the systems analysis stage. Gheani has a meeting scheduled with Tom Berber who is the New Projects Manager. They meet in Tom's office to discuss how to proceed with the project.

"This is an important project," Tom begins, "we've never done anything on this scale with the regional outlets."

"I know," Gheani responds, "Every system that I have worked on for the last two years has been one of our corporate systems. This one will be a real challenge."

"Yes," Tom replies, "everyone will be watching how this project goes. Not just because it is our first off-site project, but the resources involved are so large. The Systems Planning Group has given us a green light, so how do you want to proceed?"

"Based on the preliminary investigation project plan," Gheani begins, "I have some suggestions for the project team members and some specific dates for the project schedule. I tried some combinations in the CASE (Computer Assisted Systems Engineering) and started a project dictionary. The project is named LINKEM. I printed out these preliminary reports.."

Gheani and Tom review the CASE reports and discuss the project team assignments and the time frame for the project schedule. After some juggling, they agree on the members of the project team and a schedule for the phases of the project.

"I am having some problems with the budget" said Gheani. "If we were doing this all on site, I could use our previous projects as a guide, but I'm not sure in this situation. The problem is in our next phase of systems analysis. We will need to review the existing system at the regional outlets and then get their input for the requirements specification."

"Yes," Tom agreed. "standard operating procedure is to get that data from the users. There will be a lot more of that data than we usually get. We have about 2,500 regional outlets."

"That is the problem" Gheani said. "I have been thinking about how to contact the outlets. A bulk single-shot questionnaire with returns would cost about $1,200, but that wouldn't get all of the data we need. Interviews are out of the question since it

would take me about 13.7 years to go to every location. Telephone interviews of about an hour would be difficult to arrange, cost us around $25,000 and would still take one person about 1.8 years."

"How about a team of data gatherers" asked Tom. "What if we hired some temps or had a survey organization do the leg work?"

"I don't think we would be much better off" said Gheani. "Suppose we brought in a team of 10 to do telephone interviews. They could get the job done in about 2 months. But we would have to train them and they would have to be somewhat skilled and knowledgeable in data collection methods and systems analysis. If we used our trainees, let me see, ... (does some calculations), it would cost us about $37,500 in labor alone. And that still would not be sufficient to get the data we need. We would have to do some interviews and probably administer some questionnaires, too."

"Yes, you are right" said Tom. "The costs and time to gather the data are not reasonable. But perhaps we are still working the old way. This is a new type of project for us and we are still working with the old perspective."

"I agree" said Gheani. "You know, I was talking to Ralph in Marketing last week. He is their statistician. He was saying that they were doing a national product survey by selecting just a couple of representative sites. I remember asking how so small a group would give them national data, and he said they used standard sampling techniques. I think I should set up an appointment with Ralph to see if he can help us here."

"Good idea. See what you can come up with and let me know as soon as possible. While you are doing that, I will start the paperwork for the project team members and the schedule. When I get the approval, I'll route it to you to enter into the CASE."

Gheani meets with Ralph and get the information she needs. She quickly schedules a meeting with Tom to work out the details. At the meeting in Tom's office, Gheani begins the explanation.

"Well, you were right about the old assumptions. Ralph said that a common idea is that with a population of about 2,500 regional offices, all of them must be involved in the data collection. Wrong, wrong. He showed me some references on sampling that make it clear that we will need to only sample a small number of our regional offices to get representative data."

"How small a number?" asked Tom suspiciously.

"Well, one table he showed me indicated that we could use a sample size of 361 with a confidence of 95 percent that we would be within a few percent of the total 2,500 group results. Of course, that means that we would need to make sure that all of the 361 were in the sample with no substitutions. When I told him the situation, he said that we should have no problems since we weren't dealing with sensitive issues or a recalcitrant population."

"That does sound reasonable" said Tom. "Why don't put together a sampling plan, and then adjust the budget and the schedule if necessary. Also, since this will be our first project like this, you should thoroughly document the basis for the sampling, the procedures that will be used, and the outcome. That will be valuable information to have in the future."

"Yes, that is a good idea on the documentation. I will include that as one of our activities during the analysis phase and include it in our project dictionary. This will really be an exciting and challenging project."

1. Is the sampling issue likely to arise again for the National AutoService Company?
2. When a company is permanently linked with a computer information system that allows for the two-way exchange of data, what kinds of information will the home office find useful? What kinds of information will the regional offices find useful?
3. What do you think will be the amount budgeted for the data collection step of the LINKEM project at the National AutoService Company?
4. Did you find it a bit strange that the systems analyst and New Projects Manager knew almost nothing about statistical sampling? Discuss.

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Case Number 71

The Hiring Dilemma

by Karen C. Kaser, Assistant Professor, University of Houston-Downtown

John is the curriculum consultant for a large school district. He has been with the school district for 25 years. His career track with the school district has included the following positions: social studies teacher, social studies consultant and curriculum consultant. As curriculum consultant, John supervises 12 specialized consultants. These consultants cover the specialized areas of social studies, business education, industrial education, family and consumer science, math, science, English, and special education; they are expected to demonstrate leadership in their particular specialty. Among John's responsibilities are to ensure that his department runs smoothly, to instill a sense of positive collaboration among the consultants, and to make decisions regarding curriculum directions for the district.

John particularly enjoys discussion on academic philosophy and theory; he prefers discussion to decision making. This preference, at times, causes problems when difficult decisions must be made. John seeks the opinions of the specialized consultants through individual conferences and meetings. John's direction of these meetings can best be described as unstructured, wide open to discussion, and lacking direction. His leadership capabilities are weak, which is evident during meetings in which consultants verbally attack each other.

John was promoted to his current position by the school district's superintendent, Robert. Like John, Robert enjoys extensive discussion of academic philosophy, and he prefers to surround himself with people who believe as he does. Robert is well liked and respected by the school board members, and they trust that he will make the proper promotion decisions.

John's background in social studies and his preference for other "academic" courses has made him rather unsympathetic to the needs of vocational courses such as business education, family and consumer science, and industrial education. Although he is now the curriculum consultant covering all areas, he still is partial to social studies. Of particular annoyance to John is the economics course offered by the business education department. This course meets the graduation requirement for economics even though a similar course is offered in the social studies departments.

Richard has been the business education consultant for 30 years. He has been a strong advocate for business education and students in the district have benefited from his efforts. Richard believes that the preparation students receive through vocational courses is as important as the "academic" courses. John and Richard have differing viewpoints and often disagree over issues. Richard has announced that he will retire at the end of the school year.

The school district currently is experiencing financial difficulties, and John has been asked to make budget cuts. John must now make a decision about the business education consultant position. His options include the following:

(1) Keep the business education consultant position as is and hire a new person to replace Richard
(2) Reduce the business education consultant position to part-time, thus making it less powerful than the other consultant positions
(3) Eliminate the business education consultant position altogether

John is having much difficulty making this decision. Two candidates have expressed interest in the position if it is retained. Roger has been a high school business education teacher with the district for 20 years. He has a Masters degree in business education, has received many teaching awards, and has demonstrated leadership in business education organizations at the local, state, regional, and national levels. He also has conducted numerous staff development workshops for the district and has gained support for the district from business people in the area. He is well respected by the business teachers in the district. Gwen has been a middle school teacher with the district for 6 years and has recently received her Masters degree in economics. Before beginning her teaching career, she worked as an administrative assistant for a local company. However, she has no record of leadership in business education professional organizations or in the district. Gwen's strong background in economics makes her appealing to John as a replacement for Richard. He feels that her philosophy will be more in line with his. In addition, Gwen and her husband are friends of the superintendent, and John wonders if this should be a factor in his decision.

1. Who are the key actors in this case?
2. What kind of leadership style does John use? Is it effective in this given case?
3. How was John promoted? Could this affect his hiring decisions?
4. Is this case an example of effective or ineffective networking?
5. What decision must John make? What are the advantages/disadvantages of each decision?
6. Why would John be tempted to eliminate the business education consultant position?
7. If both candidates for the business education consultant position are good, whom do you think John should select for the position? Why?

Case Number 72

Don't Try to Change Me—Work on Yourself

by Sharon Lund O'Neil, Office of the Provost, University of Houston

Melinda has worked at the Turkish Consulate for nearly eight months. Melinda seems to enjoy working at the Consulate and she has many strong attributes. She is punctual, helpful to other workers, has an exceptionally good ability to solve problems, is very knowledgeable about world affairs, has a good business sense, and has exceptional research skills.

For a person with such a good array of skills that would point to being successful in a highly visible office, Melinda is not very well liked by her fellow employees. What are their main complaints? Melinda is a negative person—regarding herself and others. No matter how positive a situation, she finds negative aspects in every situation. She can always give ten reasons why a job or task can't or shouldn't be done. She makes rather brash comments about coworkers and visitors to the office. She is always putting people down, especially herself. On rare occasions when employees give her a compliment, she can never can merely say "thank you." She always responds in an off-handed manner or brushes off positive feedback.

In meetings, Melinda is always the "naysayer." She can dampen the spirits of the most positive person. She is a chronic complainer—about work, about family, and about life in general. While she is very capable, her work is sloppy. It is not unusual for her to turn in documents with coffee stains. Earmarked copies that have been sloppily stapled are frequently "filed" in a ragged fashion in the file cabinets. Her work station is always messy and frequently laden with lunch crumbs.

Tamera, Melinda's supervisor, is trying to help Melinda change her ways. Tamera's personality is totally opposite of Melinda's. Tamera frequently comes up with new ways to try to change Melinda's poor attitude and sloppy habits. Tamera never lets Melinda's negativism wear her down and is always looking for ways for Melinda to take more pride in herself and to improve her work products. Melinda's personal hygiene and dress have continued to slip from "neutral" when she was hired to "sloppy and unkempt". Tamera has finally decided it is past time to solicit the help of the entire office to attempt to improve Melinda's self-esteem.

1. What makes Tamera believe it is Melinda's self-esteem that needs work? What do you think? On what are Tamera's and/or your conclusions based?
2. Make a list of elements that may be contributing to Melinda's problem. Provide one or two suggestions for each of the elements that could be helpful for Melinda and her co-workers in addressing Melinda's problem.
3. Discuss how contemporary models of motivation can be applied to Melinda's situation.
4. Why is it important to have a good balance in one's life? What are the elements that need more balance in Melinda's life and how can she see that such a balance is important?
5. Why do people like to be around positive vs. negative people? How can you become more positive? How can you help others to be more positive?

Case Number 73

To Manage Or Be Managed

By Sharon Lund-O'Neil, Office of the Provost, University of Houston

Jason Ortiz is the manager/operator for one of several ice cream franchises owned by Michael Rothman. Jason has worked at The Neighborhood Creamery since it opened five years ago. About a year ago, Mr. Rothman gave Jason "free reign" of the creamery's daily operations. Jason has continued to operate the creamery at a profit. In fact, the profits of the business have to climb. Jason must be doing something right, but he is tired a lot of the time.

Jason opens the store at 10:30 a.m. and closes it at 10:30 p.m. Sunday through Thursday. On Friday and Saturday, Jason closes the store at midnight. He usually has a couple of students from the local high school help him in the evening hours, serving customers and completing custodial chores. During peak hours in the summer and evenings, Jason hires part-time workers. Jason has a difficult time trying to keep quality control with his workers, especially getting them to take pride in their work. As a result, he does most of the "real work" at the store, including purchasing, making specialty items, banking, advertising, etc.

Mr. Rothman is extremely pleased that Jason has taken such an interest in the store. Jason seems to have a good knowledge of the creamery operations. Mr. Rothman is concerned, however, that there is so much turnover in employees even though short-term employment is characteristic of the ice cream business. Mr. Rothman decided that a discussion with Jason about the business is long overdue.

1. When Mr. Rothman and Jason meet to discuss the business, what do you think should be the main topics of discussion?
2. Assume Mr. Rothman suggests to Jason that Jason needs to manage his own time better, needs to set priorities, needs to identify what is important vs. what is urgent, needs to schedule activities for himself and others, etc. Identify other areas Mr. Rothman may suggest to Jason. Explain some ways Jason could implement these suggestions in improving the operations of the creamery while helping Jason with his own self management.
3. What could Jason do to get his employees to work as a team to maximize the management of the creamery?
4. If Jason "can do everything better and faster himself", why shouldn't he continue to operate the business in the manner he knows best? What suggestions would help Jason understand he doesn't have to do everything himself?
5. Identify the good and poor management principles that are present in this case. Which ones should Jason work on to improve his own self-management skills?
6. Make a chart of good management skills. Add two columns to the right of each skill and label the columns "Organization" and "Self". Then place an "x" in the appropriate column(s) if the skill is organizational and/or if it is personal. Draw some conclusions about your chart.

Case Number 74

Where Do I Find a Telephone Card?

By Gary N. McLean, University of Minnesota, St. Paul; Melissa D. McLean, First Bank Systems, St. Paul, and Laird D. McLean, Andersen Consulting, Minneapolis

Ndichu Gitau, a professor at Canada University in Kenya, had just arrived in Minnesota for a one-quarter study leave. Shortly after his arrival, he wanted to call home to see how his family was doing. However, the telephone provided in the residence hall would not permit him to make an international long-distance call. He knew that prepaid telephone cards were very popular in many countries. They could be used in special telephones in place of cash, and an electronic display would automatically reveal the number of minutes left on the card. He made a number of inquiries, but people either didn't know about them or they didn't know where to buy them. He was frustrated because he knew how easy they were to find in other countries. When he had visited Japan, for example, they were readily available in vending machines in airports, convenience stores, on the street near public telephones, at the telephone company, and in many other locations. Cards came in a large variety of designs and two denominations. Why were they so hard to find in the United States?

Within the past year, IntelliCards had been successful in obtaining a contract with U.S. Midwest Telephone Co., formerly a part of AT&T, to produce and market prepaid telephone cards. Initially, the company proposed that the cards would use magnetic strips and that they would be in just two denominations ($10 and $25), with a basic design, and one denomination ($25 plus a $5 surcharge) with two designs—one with a professional basketball player and one with an Olympic gymnast. The $10 card is equivalent to about 40 minutes of domestic long-distance phone calls, while the $25 card is equivalent to about 100 minutes of domestic calling time. The card can also be used for local calls at the prevailing rate, usually 25 cents per call.

IntelliCards introduced the cards first at the State Fair by giving out sample $1 cards to everyone who visited U.S. Midwest's booth. Telephones that were compatible with the cards were installed in the booth so that prospective customers could try them. Feedback received at the fair suggested that one of the problems in marketing would be the lack of telephones compatible with the use of magnetic strips. As a result, IntelliCards then designed a card that could be used with a 1-800 number and a Personal Identification Number (PIN). Such a card would still provide the caller with feedback on how much time was left on the card.

The next problem confronting the company was distribution. How could they get the cards out to potential users? The marketing department conducted interviews with potential customers and received varied reactions:

a. Many of those interviewed indicated that they wouldn't use the cards because they didn't want to pay for their calls before they needed to make them.

b. Others indicated that they preferred to use cash so they would know exactly how much they had spent.
c. Some feared they would overuse the card if it had already been purchased.
d. Others indicated the fear of losing the card and the value still remaining on the card.
e. Consumers expressed concern regarding their ability to remember all the numbers required to use the call-in cards (without magnetic strips).
f. Others expressed the possibility of not using all of the units provided on the card and having so little time left that the card would not be used up, wasting some of the time and losing that portion of the cost.
g. Consumers voiced a concern that the regional makeup of phone companies in the United States would inhibit use in regions different from the region in which it was purchased. They also wondered if there wasn't some way to provide cards that could be used anywhere in the world.

On the other hand, consumers expressed positive reactions to the card:

a. Many of the people interviewed made reference to the number of times they needed to make phone calls but found themselves without change. As a result, they could not make a necessary phone call or they had to run around looking for change. This would be unnecessary with the telephone card.
b. Business people expressed the ease of keeping track of telephone expenses—a special advantage for business people on expense accounts.
c. Economically oriented consumers expressed financial benefits. Since domestic calls are billed at a common charge, there is also potential for reduced charges, depending on the locations to which people call. It would also be possible to provide free units on the cards as an incentive for people to purchase the cards.
d. Some consumers saw the potential for the cards becoming "collectibles," thus retaining some value even after they had been used.
e. Some people saw the advantage of limiting the length of a phone call, especially an international one, by limiting the length of the phone call to the time provided on one card.

Another problem was in creating a distribution plan. Initial inquiries with the post office indicated that they might be interested in selling the cards but not at the present time. Contacts with a number of major retail outlets revealed some interest, but Intellicards had not yet developed the means of packaging and selling the cards within such outlets. Initially, an agreement was made with a couple of major discount department stores to market the cards. The cards would be packaged on a cardboard backing with a plastic "window," to be hung on pegs on a rotating display case.

IntelliCards needed to reconsider its entire marketing approach. It called together a cross-section of employees to develop a revised marketing plan. Design, operations, marketing, advertising, and accounting functions were all represented in the meeting. If you were a participant in the meeting:

1. What additional consumer or market research would be useful? Why?
2. What suggestions would you make to overcome the concerns that surfaced during the consumer interviews?
3. What would your recommendations be for developing appropriate distribution outlets?
4. How would you suggest that the prepaid telephone cards be packaged?
5. What role would you expect the telephone company to play in marketing?
6. What additional sources of revenue might the company explore to market the card?

Chapter 4

Discussion Ideas for Case Studies

As discussed in the Preface, a key advantage to incorporating case studies into learning environments is to stimulate discussion and foster critical thinking. Although questions related to cases typically have no absolute solution or definitive right or wrong answers, in this chapter, case authors provide ideas to help instructors facilitate class discussion

The discussion ideas are organized by case number as identified in the Table of Contents, found at the beginning of Chapter 3. Some of the discussion ideas correspond directly with the numbered discussion questions provided at the end of each Case Study found in Chapter 3. Other discussion ideas provide general thoughts to facilitate discussion of the case study.

Case 1

Credit Card Fraud—Discussion Ideas

By K. C. Kaser

1. Who are the actors in this case?

   The key actors in this case are: Bob White (computer programmer); Bob's friends (Ron, Kelly, Pat); and other actors in the department store where Bob works.

2. What is the dilemma in this scenario?

   The dilemma in this scenario is breaking the law (white-collar crime) through computer fraud; the case is a legal case involving ethics.

3. Are one or more people guilty of a crime?

   Bob, Ron, Kelly and Pat are all guilty of a crime.

4. What is likely to happen to Bob's future career?

   Bob is destroying his career and his future.

5. What can the store do for future protection from this type of activity?

   To protect in the future from this type of activity, make it more difficult to get into the computer system and only allow certain codes to adjust bills. Monitor activity more closely.

6. Why do you think Bob responds the way he does in this case?

   Bob is responding the way he does in this case because he is using irrational reasoning. He is looking beyond ethics and his professional future.

7. How are ethics involved in this case?

   Computer, financial, and credit information ethics are involved in this case.

8. Who can be held accountable for the losses incurred by Bob's actions?

   Bob, Ron, Kelly and Pat can all be held accountable.

Case 2

Income Taxes –Discussion Ideas

By K. J. Kaser

1. How is rationalization involved in this case? What are the potential consequences of the rationalization?

   Bill rationalizes that he and his wife will not get caught when they don't report cash income.

2. Do you think Bill is correct in his assumption about social security? Why or why not?

   Bill lives in the U.S. where he is required to contribute to Social Security no matter what he believes. The government keeps finding ways to save the Social Security system.

3. Do you agree with Bill that government will have no record of Bill's cash earnings?

   The government has many means of finding out about Bill's income. The IRS can search deposits in Bill's checking account. Some of Bill's customers may use the receipts given by Bill as tax deductions.

4. What are the procedures a self-employed person should follow to pay taxes during the year?

   The self-employed person could pay taxes quarterly or monthly to keep ahead of the game.

5. What are the legal issues related to this case?

   Bill's opportunity cost of not paying taxes is the risk of being caught by the IRS.

6. What are the ethical issues related to this case?

   Answers will vary.

7. If you were Shirley's best friend and she asked for your advice on what to do regarding this dilemma, what would you recommend?

   Answers will vary.

Case 3

Where Did the Scrap Come From?—Discussion Ideas

By G. N. McLean & L. D. McLean

1. What is the Chartered Accountant's role?

   a. Insure that all accounting records are accurate, including inventory, receiving slips, shipping slips, and reconciling them.
   b. Confront the owners when it was not possible to reconcile the inventory figures.
   c. Check with suppliers and purchasers when inventory does not check to determine what was happening at all sources of potential fraud.
   d. Certify that all processes were legal and appropriate within accepted accounting principles.

2. What accounting principles were violated by Spartan Alloys?

   a. Needed documented procedures for receiving, shipping, and verifying weights.
   b. Processes for determining and verifying inventories not in place.
   c. No checks and balances on weights – depended on one signature only.

3. What accounting principles were violated by Atlas Steel Mills?

   a. Needed documented procedures for receiving and verifying weights.
   b. Processes for determining and verifying inventories did not highlight potential problems quickly enough.
   c. No checks and balances on weights – relied on receiving clerk only.

4. What more could Tom, Anne, and Robert have done?

   a. Tom could have been more confrontational with the CA.
   b. Robert could have investigated more with Frank as to exactly what happened.
   c. Phone calls could have been made to Atlas Steel Mills to determine the acceptability of Sidney's explanation.
   d. All three could have met with Malcolm and Sidney to request more information about the possible explanation.
   e. Legal authorities could be contacted for more professional investigation.
   f. A lawyer could have been consulted.
   g. They could have quit their jobs.

5. What should Tom, Anne, and Robert now do?

   a. Quitting their jobs is probably not sufficient at this stage to protect either their legal or moral culpability.
   b. Efforts have already been made to confront the owners, without success. Further efforts are simply likely to warn them that there is sufficient suspicion that they need to be more careful.
   c. Frank and the CA, given their behaviors, could well be part of the scheme to defraud the customer, so additional questions to him may also prove not to be useful.
   d. Contacting the customer may be effective, but has the potential downside of destroying business if nothing illegal is happening.
   e. At this point, the most likely to lead to a useful outcome would be reporting to legal authorities, either the police or an attorney, though they may not be able to afford paying for an attorney.

Reactions to the Outcome:

This will be very personalized. Students may talk about, for example:

a. the injustices of the legal system in terms of length of sentences relative to cost of crime and the unequal treatment of those at the top compared with the "smaller" players
b. the differences in administration of "white collar" crime versus other types of crime
c. the significant and real responsibility laid on CAs (or CPAs)
d. the temptation of bribes
e. the ease of committing fraud

Case 4

Internet Shopping—Discussion Ideas

By K. C. Kaser

1. Who are the key actors in this case?

   The key actors in this case are: John, Value TV, Internet surfer, VISA, Better Business Bureau, Action Editor, Consumer Reporter, and Congresswoman Joy Chen.

2. What issues are raised by the described technology in this case?

   Answers may vary. The problem that resulted from the use of the technology is that an internet surfer illegally used credit card account numbers.

3. If you were Congresswoman Chen, what steps would you take to control the illegal activity on the Internet?

   Answers will vary.

4. Is too much private information readily available to users on the Internet? If so, what could you do to prevent this type of incident from happening to you?

   Answers will vary.

5. Was John correct in assuming VISA would absorb the cost of the $800 credit card fraud?

   No. The credit card company did not assume responsibility for the fraudulent charges.

6. If you were John, what actions would you have taken to resolve the problem?

   To prevent this type of incident from happening to you, avoid putting too much personal information on the Internet. Make sure people with whom you do business on the Internet provide a high degree of security for credit purchases. If they do not, then absolutely do not use your credit card.

Case 5

TS Construction Company—Discussion Ideas

By R. Schramm

1. What are the advantages of each alternative? What are the disadvantages of each alternative?

   Advantages
   a. Foremen can write anywhere. They do not have to use any unfamiliar technology.
   b. Foremen do not have to learn new technology. Spoken language may be understood better than written language if foremen do not write well or legibly.
   c. Same advantages as writing.
   d. Can bring personal computer (PC) on site. Can connect from any phone line. Reports will be typed.

   Disadvantages
   a. All options should require a brief training session on what should be included in a progress report.
   b. Some high school educated people cannot write or spell. Foremen with insufficient writing skills may be against any method of written communication. Training may have to be given to some foremen on basic writing skills.
   c. Foremen will have to organize their thoughts while speaking. Some foremen will not speak clearly over the phone.
   d. Also, some people reject all new technology. Must train foremen how to use fax machine. Need to supply each foreman with a fax machine.
   e. PCs raise cost and training required considerably. The more technology required, the higher the probability of rejection by the foremen. Finally, consider how long a PC will last if a foreman takes it on site and throws it in the truck with all the other tools.

2. What is the estimated fixed cost of each alternative? What is the estimated variable cost of each alternative?

   Check costs of PCs and fax machines in PC magazines, on the web or at a local vendor.
   Costs of phone call or mail service.

3. What special training would you anticipate for each alternative?

   Training on how to write a progress report, how to use technology, basic writing skills or phone skills.

4. What alternative would you recommend Tom select? Why? Describe how you arrived at your recommendations.

   Answers will vary.

5. What can Tom do to ease the transition for the foremen to the new reporting system?

   Could implement system with some leaders as a pilot project to gain support. Can provide training. Can explain how this will effect the organization. Can tie effective progress reports to foremen evaluations at the end of the year.

6. If Tom wanted to develop a form to simplify the progress reports, what should the form include?

   Identification of project
   Time period covered
   Brief summary of previous progress
   Description of progress during time covered including:
   - problems encountered
   - solutions implemented or proposed
   - estimated delays and additional costs
   - projects completed
   - summary of upcoming plans for project completion

7. **What other recommendation(s) do you suggest to solve the problem described in the case? Describe how you arrived at your recommendation(s).**

Answers will vary.

Case 6

The Expense Account Dilemma—Discussion Ideas

By J. Barton

1. Should Keith compromise his values and submit falsified expense reports as he has been directed to do? Why or why not?

   First and foremost, Keith has to be able to live with himself. Since he has very strong feelings against submitting falsified expense reports, he probably could not compromise his values and do as he had been directed. Second, Keith is following company policy; he is in the right.

2. What do you think Keith's future actions will be regarding the expense account?

   Keith could go to Larry and Jim for advice. If they offer no help, he could go to upper management and blow the whistle. He could also continue as he has been doing in reporting his expenses.

3. What are the district manager's values?

   The district manager is certainly mandating a dishonest practice. One would question his honesty and integrity.

4. What role should the store manager and auditor play in the situation? Provide a rationale for your response.

   Jim, the store manager, and Larry, the store auditor, should intervene and support Keith. They are undoubtedly aware of the dishonest practice of padding expense accounts. However, they probably fear losing their jobs if they take a stand against the district manager. They need to reassess their values, and report the district manager to corporate headquarters.

5. Should Keith "blow the whistle" and report this rampant expense account abuse to corporate headquarters? Why or why not?

   Keith should not "blow the whistle" right away. Keith should go to the store manager and store auditor and discuss the situation. If the manager and auditor choose to do nothing, Keith has two options: blow the whistle to corporate headquarters or resign.

6. What circumstances do you think might lead to such abuse in an organization? What procedures could be implemented to control such abuse?

   This type of abuse does not evolve overnight and is an example of people taking advantage of a situation to a greater degree over time. Company officials at higher levels must communicate the company policies that are in effect and demand adherence to them.

Case 7

The Case of the Unprofessional Professional—Discussion Ideas

By M. Chalupa

1. Discuss how appropriately Gretchen handled Vernon's hints and requests for dates.

   Appropriately at first. When Vernon became insistent, Gretchen needed to be more direct and formal with her negative response.

2. If Gretchen asked you for advice after Vernon first approached her for a date, what advice would you give her?

   Advice would include discussion about how difficult it could be to work for him and be in a personal relationship. After the first request for a date, Gretchen responded appropriately—in good humor. After several repeated requests for dates, it is time to take a direct and formal approach. Explain how it would affect the working relationship, explain that you did not tell the others and that you don't appreciate the unkind and untrue remarks about performance.

3. Why do you think Gretchen's behavior and attitude changed?

   Gretchen is now fearful that anything she says or does may be misconstrued and that false accusations will damage the positive work environment and make it difficult for all to maintain the high standards and ethics set by the firm.

4. If you were Michael, what would you say to Gretchen?

   Responses may vary depending on gender and how students today interpret repeated requests for dates.
   Michael should definitely visit with Gretchen and ask her what is happening. Because her past work history has been above and beyond expectation and very professional, it is imperative to investigate what is happening. Michael should ask Gretchen how he could help her.

5. If you were Michael, what would you say to Vernon?

   Michael should explain to Vernon the high ethics and standards of the firm, the valuable role Gretchen has, and how his professional conduct, when in conflict with the firm's standards, affects the whole firm. Indicate that his actions could be seen as harassment and explain the consequences. Vernon should be told to stop asking Gretchen for dates.

6. If you were Michael, whom else would you talk to about this situation?

   Depending on results of conversations with Gretchen and Vernon, may need to visit with the partners. It may be that Vernon is not going to fit in with the firm.

7. Is this sexual harassment or flirting?

   Yes, it is a form of sexual harassment—unwelcome, unwanted, repeated. Refer to the EEOC definition of sexual harassment for more complete discussion. Class may want to view a video about sexual harassment.

8. If you were Gretchen, what actions would take in this situation?

   Visit with Michael and document this visit and conversation. Get documentation if Vernon continues to ask for dates. Have the other female office workers also document such situations. Whatever else should be done will depend on the outcome of visit with Michael and Vernon's behavior.

9. If the genders of Gretchen and Vernon were reversed in this case, would your answers to any of the above questions be different?

This is always an interesting point of view. Some will say that the date or dates would have been made. Men are not used to being sexually harassed and may not perceive such behavior as harassment. Some men may see it as an opportunity or challenge, whether it be a positive or negative challenge. Others will respond that gender is not the factor in determining how they would respond—no employee should be placed in an uncomfortable working situation.

Case 8

A Lifetime of Risk—Discussion Ideas

By K. Shrader

1. Develop a time line that is representative of Ramos' life. On the time line, identify the risks that Ramos assumes.

   —lemonade stand (no insurance)
   —purchase car (auto, liability)
   —lawn care service (probably none, liability)
   —college, borrowed money (rental insurance)
   —employed at Bits & Bytes (health insurance as provided by employer)
   —got married
   —one child (annuity or savings plan)
   —purchased home, borrowed $40,000 (at this point or before consider life insurance)
   —purchased 3-year old van (auto, liability, comprehensive, collision, medical/dental)
   —second child (additional annuity or savings plan)
   —purchased Bits & Bytes, borrowed $120,000 (additional life/mortgageinsurance, liability, health, unemployment, insurance on the business)
   —children attend college, move from home
   —expanded Bits & Bytes, 30 employees, 3 vans (additional auto, unemployment, liability)
   —retirement (at this point or before consider supplemental medical and nursing home insurance)
   —sold home, moved to condominium

2. What insurance options do you recommend for each of Ramos' risks?

   See items in number one found in parentheses.

3. What insurance changes (if any) would you propose if Ramos and Donita did not have children?

   a. may not need as much mortgage/life insurance
   b. college planning
   c. health insurance coverage to single if wife has coverage

4. What insurance changes (if any) would you propose if Ramos was self-employed but did not have any employees?

   a. no benefits needed
   b. perhaps less liability
   c. less social security
   d. less unemployment

5. What insurance changes (if any) would you propose if Ramos did not have a store front and only had a traveling repair service?

   a. less building insurance
   b. more auto coverage
   c. perhaps less liability

6. What insurance changes (if any) would you propose if Ramos had been in a position where he did not have to borrow money?

   Perhaps less life/mortgage insurance

7. Propose three changes to the case scenario. How do you changes affect Ramos' insurance needs.

   Answers will vary.

Case 9

How About A Little Extra?—Discussion Ideas

By J. Schoen Henry

General Discussion:

It appears that Frank hasn't fully decided that he is in business for himself. He has made a good start, but at some time in the development of a business the owner must set it up to operate as a true business. This includes such things as establishing a formal business plan, pricing for profit, advertising to build a good customer base, allocating resources even if it means hiring additional workers, contracting to make sure that all parties understand what is expected, and following through on both your own and customer responsibilities. Frank wants to have his own business with all the success and satisfaction that it can bring, but he is going about it as if he is still doing odd jobs for the neighbors.

Some specific actions that Frank could have taken:

a. Decide to really go into business. Although this requires gradual change, start working in that direction. Set up the business formally, probably as a corporation to best deal with personal liability. Develop a written business plan that addresses all aspects of business needs. If this was not covered in his schooling, small business development help is available from the local university or community college.
b. When pricing a job, always try to allow for a reasonable profit margin. This is often difficult to do when first going into business, but Frank should have tried to create a little buffer that would carry the business on when something goes wrong, like having to replace Mr. Hasty's plants. Even though pricing must be competitive, the business needs to make enough money to succeed. Otherwise, Frank will end up going out of business anyway.
c. Rather than to rely on "word of mouth" to gain business, Frank needs to advertise and get his business out in front of potential customers. Having a larger customer base not only generates more work, but it also allows for the opportunity to politely decline to do business with unprofitable customers like the two described in the case study.
d. Frank should always base his work on a written contract that is formally agreed upon by both parties. In negotiating such a contract, he can explain to the customer why he cannot perform work that is not included in the contract. Once the contract is executed, Frank should follow through with excellent work and service, and he should also visit sites where he has an on-going obligation in order to make sure that the customer meets his or her part of the bargain.

Case 10

Manufacturing Software Systems—Discussion Ideas

By C. Agneberg

1. If you were in Susan's position, what would you do?

   a. Take the month to develop the proposal. The exposure and networking throughout the company with other employees and managers could prove to be invaluable. This could eventually turn into a full-time position again.
   b. Don't take the offer. Request severance pay, insurance benefits and outplacement services until you find a new position.

2. Do you think it would be helpful to talk with Bill and Margaret?

   Answers will vary

3. What are Susan's legal options?

   Answers will vary.

4. Should Susan pursue legal options at this time?

   Answers will vary.

5. Should Susan begin looking for another position within or outside the company?

   Answers will vary.

6. Was Susan mislead in taking a position with an unstable group and company?

   Answers will vary

Case 11

The Computer Shop—Discussion Ideas

By C. Agneberg

1. What does Jim do when he leaves this meeting?

   Accept the money and move on with your life. Chalk it up to the "school-of-hard-knocks."

2. What can Jim do to legally protect himself?

   Consult an attorney that evening and determine what legal recourse you might have in this situation. Develop a counter-proposal asking for more money—at least 1/3 of dollars ready to come into the company and a certain percentage of the business currently in the sales pipeline.

3. Could Jim have protected himself legally form the beginning of the partnership?

   Refuse to accept the agreement. Refuse to pack your belongings. Report to work the next day as if nothing had happened. Your goal here is to not give up your share of the company.

Answers will vary for questions 4-9.

4. How should Jim have handled the rest of the meeting?

5. What happened to Sandra's agreement to talk with Gerry?

6. How could something like this happen when the three of them had worked together so closely?

7. How would you feel at this point if you were Jim?

8. What steps should Jim take after being shown the door?

9. Should Jim allow Gerry and Sandra to pack his personal belongings and be escorted to his car?

Case 12

Legal, Ethical, or Morally Correct?—Discussion Ideas

By M. Chalupa

1. Discuss the definitions of legal, ethical, and morally right.

   These terms are not easy for students to define. The law has a difficult time keeping pace with technology and determining what is and isn't legal. The issues of ethical and morally right are always a debate because of people's different cultures, experiences, and values. Some computer textbooks examine legal and ethical issues related to technology, especially software use.

2. Is it right for Wesley to do what he is suggesting? What would motivate such an action/

   Some students may respond that it is okay since Wesley would not be making money; he is only helping the church. Others may say it is stealing whether he would make money or not. Wesley's heart may be in the right place to want to help the church; it could be also that he will be getting paid (the case does not mention this). Again, students must decide if it is legal, ethical, moral. Students need to know that often what is done in reality is not necessarily what should or shouldn't be done. Just because it is done does not make it okay. It may be a good idea to point out to students that ethics come from the top and go down. If the head of the department or company is ethical, most employees will be too; but if employees see the boss conducting illegal or unethical activities, employees most probably will also at some point. It is important for a supervisor to lead by example, which may mean reprimanding employees for such improper conduct.

3. Brainstorm what actions Rochelle could take and what implications would be for each action.

   Students will debate whether Rochelle should talk to Audrey and Wesley about what she overhead, do nothing, or check policy about using company software, modified or not. Follow-up discussion could include what Rochelle could say to Audrey and Wesley.

4. Should Rochelle talk to her immediate supervisor? What should she say if she decides to talk to her supervisor?

   Some students will say Rochelle should not talk to her supervisor while others will say she should talk to her supervisor and use a hypothetical situation to ask what company policy would address the situation.

5. Would a company policy help Rochelle in determining what to do? If so, what should the policy say?

   Most students will probably agree that a policy would help supervisors and employees to know what the consequences would be for such conduct. However, some employees would just be more careful with conversations so as not to be overhead or get caught doing something illegal, immoral, or unethical. If a policy would take effect, it should be clearly stated, communicated to all, legal, consistent in its application, and address any exceptions, if any, and how those exceptions should be handled. Employees need to know the consequences of violating any policy.

6. What would you do if you were Audrey? Explain what would motivate your actions.

   Again, students' responses will vary depending on previous discussions of legal, ethical, and morally correct. Whatever the responses, the motivation behind the action should be explained. Audrey may decide to not do or say any thing as she doesn't want to know if Wesley would do as suggested. Audrey may check policy or ask Rochelle. Audrey may also decide to assist Wesley in modifying the database for the church's needs.

Case 13

The Case of the Sometimes Lazy Listener—Discussion Ideas

By J. Calvert Scott

1. What evident in the case supports the position that Mrs. Black is a good listener?

   Among the evidence in the case that supports the position that Mrs. Black is a good listener are her verifying her understanding of a request for information and her writing down relevant information while she converses with her friend.

2. What evidence in the case supports the position that Mrs. Black is not a good listener? Support your position?

   Among the evidence in the case that supports the position that Mrs. Black is not a good listener are her retrieving the incorrect files, her placing them in the wrong location, and her scheduling an appointment on the wrong day.

3. Do you think advancing age and hearing loss are major facotrs in Mrs. Black's listening problem? Why or why not?

   Advancing age and hearing loss are not major factors in Mrs. Black's listening problem because she is able to hear and understand well when she is conversing with friends and is focused on getting the details correct.

4. How do you evaluate the way in which Mr. Chan dealt with Mrs. Black's listening problem? What actions could Mr. Chan take to encourage Mrs. Black to listen?

   Opinions and supporting reasons may vary somewhat regarding the way in which Mr. Chan dealt with Mrs. Black's listening problem. Many will perceive that at least initially he responded effectively, although some will express concern about his somewhat emotional rather than rational response after receiving Mr. Reinhardt's telephone call. His inquiries about her advancing age and health may be interpreted by some as offensive, especially if they were delivered in a sarcastic tone of voice. Mr. Chan might ask Mrs. Black to concentrate, to repeat instructions, and to write down instructions in order to encourage her to listen more carefully.

5. What might happen to Mrs. Black if Mr. Chan were not so kind or understanding?

   After Mr. Chan has verbally reprimanded Mrs. Black several times, he might record listening problems on her performance review. If the listening problems continue, they could lead to Mrs. Black's work being unsatisfactory and unacceptable, which are legitimate reasons for Mr. Chan to terminate her employment.

6. What is the difference between hearing and listening, and why is this difference so important?

   Hearing is the physical process of receiving and processing sounds, and listening is being attuned to what is said. While related, the two are not synonymous. It is possible to hear and not to listen, but it is impossible to listen and not to hear.

7. What might Mrs. Black do to improve her listening skills at work?

   Suggestions will vary somewhat on this item. To improve her listening skills at work, Mrs. Black should be as attentive as she is when conversing with friends. She should take notes, ask questions, and reconfirm her understanding before taking action.

8. How do your own listening skills compare and contrast with those of Mrs. Black?

   Individual answers will vary on this item but should indicate how the individual's listening skills are like and unlike Mrs. Black's listening skills.

Case 14

The Case of the Questionable Writing—Discussion Ideas

By J. Calvert Scott

1. In what ways was Sandy Watanabe's background unusual for an American citizen?

   Sandy Watanabe's background was unusual for an American citizen because of the strong family ties to another country. Her family spoke primarily Japanese at home and a mixture of Japanese and English at work. Her family and business life centered more on Japan than on the United States. Although her parents were second-generation Japanese-Americans, their attitudes reflected traditional Japanese attitudes, not traditional American attitudes.

2. How did Sandy Watanabe's life in Hawaii prepare her for her job in Washington, D.C.?

   Sandy Watanabe's life in Hawaii prepared her for work in Washington, D.C., in the State Department. She learned the Japanese language and culture well through her firsthand experiences at home, at work, and in Japan.

3. Was Carolyn overstepping her role at work when she questioned the content of one of Sandy Watanabe's letters? Why or why not?

   Viewpoints will vary somewhat regarding whether or not Carolyn overstepped her role at work when she questioned the contents of one of Sandy Watanabe's letters. Some may think that because the contents of the letter appeared to be highly unusual, she was justified in questioning the appropriateness of the letter. Some may counter that since Carolyn is an inexperienced employee herself, she should just mind her own business and concentrate on doing her own job well.

4. Why do you think that Carolyn misinterpreted Sandy Watanabe's letter?

   Carolyn misinterpreted Sandy Watanabe's letter because she tried to judge it by American standards in spite of the fact that the letter should have been judged by Japanese standards, the perspective of the recipient.

5. How effectively do you think the head stenographer dealt with the questionable letter?

   Although responses on this item will vary somewhat, many will argue that the head stenographer dealt satisfactorily with the matter, listening empathetically, trying not to take sides prematurely, and turning the situation into learning experiences for Carolyn.

6. Under what circumstances, if any, should American citizens create letters with unusual messages?

   Letters must have messages that are appropriate for their recipients. When the recipients live in other countries, it may be necessary to deviate from the standard American letter-writing practices.

7. If Carolyn wants to learn more about writing in a culturally sensitive manner, what would you advise her to do?

   To learn more about writing in a culturally sensitive manner, Carolyn might enroll in an international business-communication course. She might also read books about cross-cultural understanding and international business communication. She might also study the culture, the way of life, of a country in which she has interest.

Case 15

The Korean HRD Connection—Discussion Ideas

By G. McLean

1. What more would you like to know?

   a. How did the company find out about Dr. Johnson?
   b. What budget is available?
   c. When are they planning to do the workshop?
   d. What will be included in the training in Korea, both before and after the 10-week workshop?
   e. What are the outcomes/objectives anticipated from each of the content areas?
   f. How were these content areas established?
   g. Specifically, who are the participants?
   h. What is the level of English skill of the participants?
   i. Would Dr. Johnson be responsible for developing the infrastructure, i.e., lodging, transportation, break snacks, social activities, duplication and packaging of training materials, ordering of books, etc.

2. What problems will need to be overcome?

   a. Language
   b. Distance
   c. Time differential (typically, Korea is 14 hours ahead of Central Standard Time in the U.S.)
   d. Coordinating all of the activities (project management)
   e. Getting to know each other

3. What ways might be used to overcome the problems?

   a. Use e-mail, real-time, hopefully with the use of a mini-camera mounted on computers (e.g., See-U, See-Me cameras).
   b. Hire one of the former students who knows both English and Korean to act as an intermediary.
   c. If funds allow, Dr. Johnson should travel to the U.S., or the Korean coordinator from the company should travel to the U.S. for face-to-face meetings.
   d. Dr. Johnson could hire a project coordinator in the U.S., perhaps one of his current Korean graduate students.
   e. Contract with colleagues or other consultants to participate with a clause that excludes them from working independently with the company.

4. What proposal components would be included given current information?

   a. Johnson's consulting philosophy
   b. Johnson's consulting and international experience
   c. Proposed outcomes/objectives that can reasonably be accomplished in the time allotted
   d. A timeline
   e. A tentative agenda and calendar
   f. A tentative budget
   g. Optional social activities
   h. Optional field trip locations
   i. Housing alternatives and costs
   j. Proposed contract

5. How might this workshop differ from one offered in the U.S.?

   a. HRD may be defined differently in the two countries.
   b. HRD professionals in Korea might be less experienced in HRD than those in the U.S.
   c. Business structures, strategies, and philosophies in Korea are different from those in the U.S.
   d. The role of the government in business is different in Korea than in the U.S.
   e. U.S. workshops may contain more content because there is not a need for translation or for slower speaking to assistf.
   f. The influence of Confucianism and Taoism must be considered in developing the Korean workshop.
   g. Some subjects, such as gender, sexual harassment, and ethnic/racial diversity will be viewed differently in the two countries.
   h. The influence of legislation that is critical in the U.S. will not be present within the Korean context, e.g., Equal Employment Opportunities (EEO), Americans with Disabilities Act (ADA), Office of Safety and Hazards Act (OSHA), etc.
   i. Workshop participation will be different as Koreans are still accustomed to lecture rather than experiential format, and hierarchy is more respected, so there will be hesitation within the Korean workshop to question the instructor and to participate for fear of embarrassing their superiors or company.

Case 16

But It Was Only a Little Lie . . . –Discussion Ideas

By J. Barton

1. Was Amy wrong in misrepresenting her qualification even though she truthfully thought she would be able to correct her writing deficiencies?

   Yes, Amy was wrong to misrepresent her qualifications. Even though she thought she would be able to correct her writing deficiencies, lying about her writing skills in order to get the job was dishonest and ethically wrong.

2. How could the Human Resources Department have more thoroughly checked Amy's qualifications?

   Before hiring Amy, the Human Resources Department could have tested Amy on her writing ability, checked her business communication grades on her college transcript, and asked her business communications instructor for a recommendation.

3. Can Amy legally be fired because she misrepresented her qualification during the interview and lacks the writing skills needed for the job?

   Yes, misrepresentation of qualifications made during the hiring process may be grounds for dismissal.

4. If given a second chance, what can Amy do to improve her writing skills?

   Amy could take a writing course at a nearby community college, college, or university, or enroll in a writing class in an adult education program. She could also study on her own.

5. Was Amy correct in assuming that technology is eliminating the need for good business writing skills?

   Amy was not correct in making this assumption. A large percentage of business transactions still involve written correspondence. Rather than eliminating the need for good business writing skills, communication technologies have made the composition and transmission of correspondence easier and faster. Although computers, software, scanners, the Internet, electronic mail, facsimile machines, etc., have had a major impact on communication processes, good writing skills are still essential.

Case 17

I Know I'm Right—Discussion Ideas

By J. Barton

1. How long should Susan have waited before sharing her perceptions of the quality of letters being sent from the department? Why?

   Susan should certainly have waited until she was accepted by the departmental staff, gained credibility, and was fully aware of departmental operations. By criticizing the writing ability of her co-workers and making suggestions for improvements after only one week of employment, Susan was viewed by the present staff as being adversarial and a know-it-all.

2. Did Susan use the right approach when she brought this matter up with Mike? If not, what approach would you suggest?

   No, Susan used a very direct and confrontational approach that immediately put Mike on the defensive. If she had used a softer, more indirect approach after she had established herself as a valuable employee, Mike would probably have reacted more positively.

3. Should Susan have "named names"? Why or why not?

   Susan should have generalized the problem rather than "named names." This approach was both unprofessional and tactless.

4. After telling Susan (a) he was happy with her qualifications, (b) he hoped she would bring fresh ideas to the department, and (c) she should talk with him about her concerns, why did Mike react as he did?

   Mike undoubtedly reacted as he did because Susan is a very new employee who knows relatively nothing about the department. As a ten-year veteran and office manager, he feels a loyalty to his staff and resents criticism from a new hire.

5. Should Mike have shared Susan's comments with other staff members? Why or why not?

   Mike was wrong to share Susan's comments with other staff members. As the office manager, Mike had the obligation to keep this conversation to himself. He surely knew the staff would react negatively to Susan's criticisms.

6. If Susan pursues the matter, do you think her job is in danger? Provide reasons why you answered as you did.

   Whether Susan's job is in danger depends on her conditions of employment. If she was hired with a probationary period and continues to be vocal about the quality of written communications (after being told to desist), she runs the risk of being dismissed.

7. If you were Susan, what would you do to mend fences but still work toward improving the quality of letters being sent to promote the state to travelers throughout the world?

   Susan needs to regain the goodwill of Mike and the departmental staff before she can approach the subject again. Winning back the goodwill of Mike and her co-workers will probably take time. She needs to proceed slowly and cautiously. As a first step, apologizing to Mike and her co-workers could help smooth things over. Susan needs to establish her credibility by doing her work well and becoming recognized as a valued employee before making more suggestions. After Susan mends her fences and is recognized as a credible employee, she might suggest form letters, mail merges, and boilerplate paragraphs as "time savers." These form letters, mail merges, and boilerplate paragraphs could be used by all persons in the department and would save countless hours of work. With Mike's approval, she could write these letters and paragraphs. After gaining Mike's support, a suggestion could also be made to provide employees with opportunities to develop their writing skills through seminars, workshops, or college courses.

Case 18

Don't Put All Your Eggs in One Basket—Discussion Ideas

J. Barton

1. Should Sarah have "put all her eggs in one basket" by relying entirely on her PowerPoint presentation without preparing an alternative in case of computer problems?

   Sarah should not have relied entirely upon her slide presentation. She should have operated under the premise that "if something can go wrong, it will." Being aware of potential computer problems and preparing a contingency plan only makes good sense.

   As a backup, Sarah could have done one or more of the following:
   (1) Made transparencies of her PowerPoint slides.
   (2) Printed a copy of her PowerPoint outline.
   (3) Made notes pages or note cards.
   (4) Prepared handouts for the audience.

2. Is there anything Sarah or the session moderator could have done to salvage her presentation? If so, what actions could Sarah have taken? What actions could the session moderator have taken?

   Sarah needed to calm down. Since she had prepared the presentation herself, she could quickly have jotted down a brief outline to follow. The session moderator could have contacted the hotel's convention office to see if another computer was available. The moderator might also have taken Sarah's disk to the convention office and printed a copy of the PowerPoint outline or slides, if PowerPoint was loaded on an office computer.

3. If you were Sarah, how would you have prepared for this presentation?

   Answers will vary.

4. Do you think Sarah ruined her chances to be considered for employment by any company representatives who attended her session? Why or why not?

   Two approaches might be considered when answering this question.
   (1) Some of the audience members may be acquainted with Sarah and know that she is good at her job. They might be understanding and recognize the stress that she was under because of the computer problem.
   (2) Those audience members who don't know Sarah probably would not be inclined to hire her into their companies.

5. What actions might Sarah take to salvage her credibility after the presentation?

   Sarah might talk with company representatives at the convention and through informal conversation reestablish herself as being very knowledgeable concerning networking. She could also participate in question and answer discussions that often occur at the end of convention sessions. In the future, Sarah might give other conference presentations or publish articles in technology journals. She could also join this professional organization and become an active member.

Case 19

Email Training or Sabotage—Discussion Ideas

J. Schoen Henry

General Discussion:

Priscilla, as a new Network Administrator, should have reviewed the culture of the organization in addition to the technical concerns of the networking system in order to plan how to promote acceptance and proper usage of the e-mail system. Knowing how to work with the group of users, and especially with individuals who may require extra help, would have helped her make better decisions about what needed to be done to reduce the problems that brokers were having with the new system. It would have been beneficial if she or the company had seen to it that she had some training in people skills. In addition, someone in the management structure should have anticipated that Priscilla would need some mentoring to help her through something as traumatic (to the brokers) as a new e-mail system. Young workers entering administrative/management positions need to review their needs for training in all the areas to be involved, but most especially in the people skill areas.

Some specific actions that Priscilla could have taken:

a. Write up instructions for using the new e-mail system, focusing on keeping it as simple as possible. Even though all the problems had not yet surfaced, the brokers need something at hand that will help them use the system on their own. The instructions could be revised frequently to address new problems as they surface. Remember that the extra time needed to do this should be viewed as a primary job activity, not as an extra that could be done as time permitted. Priscilla's success in her new role depends on the smooth transition to the new system.

b. Discuss the problems of broker dissatisfaction, and Ms. Green's in particular, with the office manager, Mrs. Clout. Try to get help to determine what actions might work best. After all, Mrs. Clout should want to see Priscilla succeed in her new job, as well as having the office operate as smoothly as possible.

c. With a person like Ms. Green, it may be necessary to devote extra time to personally help her with her e-mail usage. This can lead to over-dependence by Ms. Green, but that may be better than having her criticize the system and Priscilla's abilities. Over time, Ms. Green could be weaned away from this extra attention.

d. As a new administrator, it is always a good idea to document any events with other employees which result in conflict. Priscilla should keep a written account of the problems that Ms. Green has with her e-mail usage. With documentation showing that Ms. Green keeps making the same mistakes, the blame shifts from Priscilla to Ms. Green should it come to a confrontation with management.

Case 20

The Promotion—Discussion Ideas

J. Schoen Henry

General Discussion:

Promotions often cause turmoil in an organization, no matter how justified or how well planned. Part of this problem may be that the organization does not have a clearly stated policy for promoting, one that allows for advancing a person who is less senior than other employees. Of course, there is nothing that Judy could do about the company's responsibilities. Therefore, it is most important that an individual like Judy who is ambitious and willing to accept promotion gets prepared for the new responsibilities. Judy allowed herself to get caught up in the work to the point that she neglected her own needs to develop skills in areas where she was weak. It is not easy to do, but some balance in work and personal goals must be maintained. Mary helps Judy a lot by giving her two weeks to prepare to enter the supervisory job. But, if she really wants the job, Judy has a lot to accomplish in that short time.

Some specific actions that Judy could take:

a. Although this is hindsight, when she started feeling frustrated about having time to take night courses, Judy could have involved Mary in her career planning. This should have led to more consideration for Judy's need to have a lighter work load without harming Mary's opinion of Judy's potential as a supervisor. But especially now that she has a lot to do in a little time, Judy should take Mary up on her offer to support Judy's efforts to get ready to take on the new job. This would include an analysis of Judy's strengths and weaknesses, help with the development and rehearsal of the presentation to management, and help with a rehearsal of her planned first meeting with the employees that she will be supervising.

b. Spend as much time as possible in preparing herself for the promotion announcement in two weeks. She must build on both her own ambition and Mary's support, and also identify her own shortcomings which need to be addressed (i.e., shyness and inexperience). Judy needs to break out of her self-imposed shell and start communicating with other employees whenever the opportunity arises. If necessary, she should undertake a quick review of communicating skills and put them into practice on a day-to-day and even hour-to-hour basis.

c. Prepare for and rehearse her presentation to management. Although it may not seem like it to the inexperienced speaker, ten minutes is a relatively short time to make a presentation. Judy needs to keep her presentation short and focus on only one main idea that she wants to get across. After she has drafted the presentation, she needs to rehearse it, at first by herself in front of a mirror and then to Mary and any other person she trusts to be supportive. Not only should she practice what she is going to say, Judy should also work on how she is going to make her presentation.

d. Prepare herself for the expected reaction of those employees who may resent her promotion. This would involve a review of supervisory skills and dealing with people in difficult or stressful situations. Again, Judy should rehearse with Mary how she would react in the types of situations that she might encounter with the disgruntled workers.

Case 21

I Thought I Knew What It Wanted—Discussion Ideas

J. Schoen Henry

General Discussion:

Basically, this case represents a customer service problem. The National Science Foundation (NSF), the potential customer, wanted a particular type of study to provide a particular set of answers which would meet its needs. James's string of success has apparently led him to think that he knows everything that is needed to meet the needs of another organization. This means that James is not working closely with the customer to determine their needs. Request for Proposals (RFP's) typically provide a great amount of detail about what is wanted, when and how. Often, the criteria for judging any proposals are also included. James totally missed the boat on this one. If there is one good thing that resulted from this fiasco, it may be that James learned an important lesson that will make him even more successful in his future work.

Some specific actions that James could have taken:

a. To avoid the problem, James should have been very careful to determine what the RFP said. He should have carefully read the RFP and written his proposal with the NSF's stated needs continuously in his mind, constantly trying to do the best things for the NSF. A list of the NSF's desired outcomes should have been the backbone of James's planning. Instead, he let the structure and processes of his own organization determine how the proposal was developed.

b. James has to report back to the Director about why the proposal was not accepted. His earlier attempt to blame the NSF was not only wrong, it reflects poorly on his credibility and judgement. He needs to think through what happened and how he was at fault. Then, he needs to face the Director and let him know exactly what happened and why the proposal was not accepted. Although this admission will be difficult and may cost him some status in the War College, it also gives James the opportunity to lay out for the Director exactly where he went wrong, why, and what he will do in the future to avoid making this kind of mistake again. Having a specific plan for avoiding similar problems will go a long way to convince the Director that James has learned a valuable lesson that will benefit both him and the War College in the future.

Case 22

Choosing the Best Opportunities—Opportunity Costs—Discussion Ideas

By R. Luft

There are several points to consider in this case. Some of the concerns that students should address are economic and others are personal. Possible considerations are:

1. What is the opportunity cost for Angela Star if she elected to go back to her home state and pass up the job offer from the prestigious medical group? What is the opportunity cost for her home state governmetn for a program like this one?

   If Angela were to go back to her home state, she would have her state and parental loans forgiven, however she would have to establish her own practice and that would be expensive and in a rural state, a specialization like hers may not be as necessary. If she accepts the position she was offered, her salary might seem a little low to begin with, but if you assume she will receive the five percent salary increase every six months, that amount compounded will boost her salary quickly. Profit sharing will also greatly enhance her salary. In a position in her home state, she would most likely struggle to gain a foothold with her practice.

   From a personal perspective, if she chooses to return to her home state, she will be near family members who want her close to home. At the same time, she would be separating herself from the friends she has made while in medical school. Since the medical school is in the Midwest and her home state is a rural Western state, she wouldn't be too far from family. In our vast United States, it is still possible to get to another place, even across the country, in one day of flying.

2. What is the opportunity cost for Angela Star if she elected to accept the job offer with the prestigious medical group and not go back to her home state?

   Refer to number one above.

3. What are the factors for Angela to consider when she makes her decision? Make a list of pros and cons for each of the employment opportunities confronting her?

   Factors to consider include: income, expenses, potential increases in income, proximity to family and friends, living expenses, moral obligation to her home state, acceptance of a young single female in a community, entertainment opportunities for a young single female, and others that yours student might consider.

4. Discuss the economic benefits to a state government with a program such as the medical school loan program. Is it more beneficial to the citizens of the state to have the borrowers return to the stae, to pay back the loans?

   Most rural areas have difficulty attracting and keeping doctors who are highly qualified. It is a risk for a state to loan money to medical students, but if the bonds are great enough with family and the student's home area, the returns could be high for the state. Forgiving only a portion of the loan each year should provide incentive for the doctors to maintain their practice in the rural state. If the doctor has difficulty in building a practice, it could be more beneficial for him or her to move to a more populated area. It is difficult to determine if the taxpayers in a state benefit most by having the loan recipient pay back the loan with interest, or to have them establish a practice in the state . . . that might very well depend on the doctor's skills and where they locate in the state.

5. How much influence do you think being from a sparsely populated state with restricted opportunities bear on a final decision? What if Angela were from a heavily populated state to which she could return and potentially have greater immediate opportunities?

   Being from a sparsely populated state would have a great amount of influence on a beginning doctor's decisions to establish a practice. There should be no doubt that income is important and very few people have the true "missionary spirit" which would foster their decisions to forego income for the opportunity to help others.

6. Should state and/or the federal government be involved in programs such as this? How closely related to a "welfare program" is this type of loan forgiveness program?

   Many rural states find themselves with an extreme shortage of professionals . . . not only doctors. It is beneficial for these states to offer some sort of incentive to attract needed professionals. This is not a welfare program because it does require repayment if there is no performance. You might consider a quasi-related situation in your discussions . . . should the government fund farmers for crops not grown, or when crops aren't as good as they should be, or should the tobacco industry be subsidized??!! Be prepared if you get into those discussions.

7. Essentially the state government is competing with private enterprise when making loans to citizens. Does a state have advantages or disadvantages when compared to private business? What are they?

   A state does have an advantage because the state spends taxpayer's money and is not profit-oriented. A private lending institution cannot forgive loans because that is one of their primary sources of income.

Case 23

The Case of the Vanishing Dream—Discussion Ideas

By J. Calvert Scott

1. In what ways was Kelly Smith suited to be an entrepreneur?

   Kelly Smith was suited to be an entrepreneur in several senses. She was motivated to succeed in business. She was independent minded. She possessed valuable designing and marketing skills. She worked hard to build up Forever T-Shirts. She wisely targeted her products toward affluent customers.

2. In what ways was Kelly smith unsuited to be an entrepreneur?

   Kelly Smith was unsuited to be an entrepreneur in several senses. She lacked managerial and financial skills. She was short of financial resources. She didn't have a good business sense. She had difficulty coping with the stresses associated with owning and operating her own business.

3. What contributions might Sue Milligan have been able to make to Forever T-Shirt?

   Sue Milligan could have contributed business and managerial skills, knowledge about and firsthand experience in the Japanese market, and additional financial resources.

4. What factors did Kelly smith forget to consider when she tired to get rich quickly?

   Kelly Smith assumed that everything would work out exactly as planned, which rarely happens in the real world. She acted as if she already had the $150,000 investment from Sue Milligan. She assumed that Ted Bacca could sell all of the extra 50,000 designer T-shirts from the final production run in spite of the fact that they wouldn't be available until the middle of the season.

5. Why are financial matters so important for a successful proprietorship?

   Financial matters are very important to a successful proprietorship because they strongly influence what can be done. Without an adequate amount of money, a business cannot operate. It cannot acquire goods or services to sell, it cannot pay its employees, and it cannot pay its bills.

6. Why do you think Forever T-Shirts had difficulty in meeting its financial commitments?

   Forever T-Shirts had difficulty in meeting its financial commitments on a regular basis because it did not have enough working capital. It needed more money to design, manufacture, and sell more products day in and day out. Money did not always come back into the business when it was needed since the business was relatively small and had fluctuating sales.

7. What options does Kelly Smith have now that Sue Milligan is dead?

   Now that Sue Milligan is dead, Kelly Smith has several options. She might try to cancel the latest production order, even if it meant paying a cancellation fee. She might try to borrow the needed money elsewhere—perhaps from her father or Sue's wealthy family. She might try to quickly find a new potential business partner who has cash to invest. If all of these options fail, she might be forced to close her business in order to pay its debts.

8. What common sayings reflect lessons that can be learned from The Case of the Vanishing Dream?

   Answers will vary somewhat on this item. Lessons that can be learned from The Case of the Vanishing Dream are reflected in such common sayings as the following: Don't count your chickens before they hatch. All that glitters is not gold. Skim milk masquerades as cream. A stitch in time saves nine. The pathway to hell is filled with good intentions.

Case 24

Mr. Guy—Discussion Ideas

By K. J. Kaser

1. Who are the key participants in the case?

   Key actors are Bob Massey; Owners of the current shopping mall; owners of the new mall; Lessees (shoe store, tuxedo rental shop, upscale gift shop, college bookstore, candy store).

2. What are the key issues in this case?

   Remodeling the current store; new location for the store when the lease is up; which stores to lease to; rent per square foot; competition with national chains.

3. What are the long-term factors that must be considered by Bob?

   Continuing the loyal customer base; finding a suitable location; possibly running two locations; competing with the large chain stores.

4. If you were Bob, how would you determine to which stores to continue leasing?

   Determine which stores have the most customer traffic, which can also increase the income for Mr. Guy.

5. How can remodeling be accomplished without interrupting normal business for two months?

   Remodel the store in sections. Have special remodeling sales to attract customer traffic.

6. What should Bob be doing now to prepare for six years from now? For two years from now?

   Bob needs to locate prospective business sites for the future. This may mean a commitment now for the that the store will not longer be located in the current mall after the lease runs out.

7. What should be emphasized in advertising to set Mr. Guy apart from the big competitors?

   Specialty store; specialized services (alterations, deliveries)

8. As a consultant, what tactics would you suggest that Bob use when dealing with the current shopping mall owners?

   Answers may vary.

Case 25

The Great Defender—Discussion Ideas

By R. Luft

1. What options do the Middletons have if they want to get their product in the hands of distributors in countries other than the United States?

   They might consider linking with the two companies that called them with interests in distributing their products. They should first conduct research into selling their products internationally. They should look at other opportunities that might exist for exporting their products. To take this first big step into international sales, they might want to seek the services of a consulting firm to help them establish the best form of distribution for their product. They will also have to consider licenses and fees that would be necessary; they would have to consider their own production capabilities; and they would have to consider the pitfalls of international sales.

2. What considerations are there if they want to establish a manufacturing facility in Korea or Malaysia rather than exporting the products from their U.S. location?

   Any time a business is considering manufacturing their products in another country, cultural and business operation differences are important. If they were to establish manufacturing facilities in one or both of the countries being considered, they would have to investigate labor supplies, skills of the workers, political and cultural ramifications, costs, quality of the finished products, how to manage facilities, and much more. Have your students make lists of what they consider the pros and cons of exporting versus producing in the foreign country.

3. How does someone who knows nothing about international business learn the best ways to do business internationally?

   The Middletons should study books on international business. Since they may not have the time to spend to learn everything there is to know about exporting or operating in a foreign country, they should secure a consultant who can assist them.

4. If the Middletons decide to manufacture their products in the United States to be exported to Korea and/or Malaysia, what do they need to know about currency exchange rates? What affect would changes in currency rates have on pricing their product?

   They should know what influences exchange rates and be able to determine how these changes will affect their prices and profitability. They need to know that as exchange rates become less favorable for the United States dollar, their profits will be lowered and they may have to raise prices.

5. Should the Middletons know anything about he social and cultural differences of the countries in which their products would be sold?

   Yes, they should investigate cultural differences regarding the effects their product might have on clientele; they need to know how to socialize and conduct business with people in the countries they are considering; they need to know something about the religious influences in the international countries; they should be aware of gestures and body language that might be misinterpreted in other countries; and, they should learn how to overcome language differences. Americans take for granted many of the gestures and the slang terms we use. Some would be unacceptable in other countries, and others would be completely misunderstood.

6. Is it necessary for one or both of the Middletons to visit the countries before they decide to market their product in those countries? What would be the benefits of visiting the countries?

   Both of the Middletons should visit the countries they are considering. A visit to the countries would help them to understand some of the business, political, and social differences that exist. It would also give them the opportunity to see first hand what conditions exist in the countries. It would be difficult for them to make decisions without this experience.

7. List all of the recommendations you would make for the Middletons to consider before they make a final decision.

This list could be very long, and a brainstorming session might help to produce a lot of ideas for discussion. Students should consider such things as:

- Visit the countries
- Study cultures
- Study business practices in international countries
- Study alternative ways to get products to market in other countries
- Hire a consultant
- Determine licenses that are needed
- Analyze costs and revenue potential
- Determine management problems
- Determine labor problems
- Understand the political structure of the countries.

Case 26

To Grow or Not to Grow—Supply and Demand—Discussion Ideas

By R. Luft

1. Draw a demand curve and a supply curve using the information in the table presented in the case.

   Supply and demand curves should be drafted using the table. Have the students place them on the same vertical and horizontal axis in order to understand how supply and demand meet.

2. Use your demand and supply curve to determine equilibrium price for the most popular bicycle model in the store.

   Equilibrium price should be where supply and demand meet.....$500.

3. From your curves, what did you find to be the equilibrium price?

   $500

4. What would be the result if the Tritinos planned their inventory to sell 95 bicycles per week at a price of $600 each? What if they lowered the price to $425 but were only willing to sell five bicycles at that price . . . what would be the result?

   If they raised the price, economically they should see much less demand for the product, unless there is a shift in the curves. This could happen if there is no competition nearby. If they lowered the prices too much, they would not want to sell as many bicycles since they could be losing money, or may not be able to meet their other expenses.

5. At what price should the Tritinos sell bicycles to earn the most revenue?

   The optimal price is the equilibrium price even when there is a shift in the curves.

6. If the Tritinos were forced to raise their prices because their costs went up, a new supply and demand curve would result. Draw new supply and demand curves based on an increase of $20 per bicycle.

   New curves should reflect the appropriate changes.

7. How does this information help the Tritinos in making decision about expanding their business? About pricing products? About profitability in a business?

   This information won't answer all the questions the Tritinos have for their business. It should provide an opportunity for them to see what might happen with bicycle sales if they price their products differently. They would also realize that they can increase profitablilty if they can raise prices and demand for their products at a time when their own costs are not increasing. They must also take into consideration that their competition is out of business. This should cause greater business for them, not only with sales, but service too.

8. If the Tritino's bicycle shop is the only one in town, what degree of competition do they have? What would their business be called?

   The Tritino's appear to have a monopoly in their town. We don't know how far it is to the nearest bicycle shop so can't tell how big an area they monopolize. With higher priced items, many customers don't have the capacity to haul them very far after a purchase, so local personnel might have a tendency to buy in their hometown.

9. To what degree should the Tritino's personal values enter into their decision? How would you factor the "worth" of Gina's time into the decision process?

   Answers will vary.

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Case 27

The Case of the Taxing Matter—Discussion Ideas

By J. Calvert Scott

1. What are the major issues in the case?

   The major issues in the case are whether or not there should be a sales tax on food and on what basis that decision should be made.

2. What are the economic arguments for a sales tax on food?

   The economic arguments in favor of a sales tax on food include that it generates considerable revenue and that since everyone eats, everyone pays a proportionate share of tax.

3. What are the economic arguments against a sales tax on food?

   The economic arguments against a sales tax on food include that it places a financial burden on the poor, those least able to pay, and that it may deprive children, the disabled, and the poor of other necessities of life.

4. What are the political arguments for a sales tax on food?

   The political arguments in favor of a sales tax on food include that it is a fair tax because everyone pays and that since many states have it, it is one of the more acceptable forms of taxation, in part because it is paid in small installments on a frequent basis.

5. What are the political arguments against a sales tax on food?

   The political arguments against a sales tax on food include that it is unpopular among those with low and fixed incomes and that it disproportionately places a tax burden of those least able to pay.

6. What role, if any, do you think political considerations should have in determining the fate of the sales tax on food?

   Opinions will vary on this item. Some may argue that political considerations—especially re-election—should not be a factor in decision making about the status of a sales tax of food. Others may argue that political considerations can never be entirely eliminated and that both economic and political considerations must be balanced when determining the status of a sales tax on food.

7. If you were Jeff Buttersworth, which position would you advise Governor Broadbent to take on the sales tax on Food? Why?

   Opinions will vary on this item. Some will recommend that there be a sales tax on food and support that position with economic and/or political arguments. Others will recommend that there not be a sales tax on food and support that position with economic and/or political arguments.

Case 28

A State's Moral Dilemma—Promoting Gambling—Discussion Ideas

By R. Luft

1. Discuss the ethics of state governments promoting gambling as a primary attraction for travelers to visit a specific state.

   State governments must consider the effects gambling opportunities have on the poor and those on welfare. These people don't have the money to spend on gambling, but often spend large amounts of what they do have hoping to strike it rich. Some states are more blessed with scenic attractions or nice weather than are other states. In some states, the main attractions are the opportunities for gambling and other forms of entertainment. While states can't make moral decisions for their citizens, there must be an awareness of the effects of gambling on specific social strata.

2. What if gambling is not promoted as a primary attraction but as a byproduct of things that are available to do in a state? Do you think this type of marketing campaign would change the concerns of those who feel that states shouldn't promote gambling? To whom would this type of promotion appeal?

   People will always exist who feel that gambling shouldn't be available or promoted. It doesn't matter what else attracts tourists. There will also be those who believe that gambling is just another form of entertainment and adults should be able to make decisions about how they spend their money.

3. If a state were to only target their marketing campaign for gambling opportunities to out-of-state audiences, do you think that type of marketing campaign would change the way some feel about the marketing plan? To whom would this type of promotion appeal?

   It would be difficult for states to market gambling opportunities to out-of-state audiences only. Residents would feel the impact as well. Most marketing plans would include in- and out-of-state audiences. In most states, larger revenues will be realized from in-state gamblers.

4. Should state governments listen to the concerns of groups who don't want any gambling in the state? What might motivate such opposition and how can such opposition effect the design of a promotional campaign?

   Groups who do not favor gambling opportunities must be heard...they are most likely taxpayers. Groups like these are normally in a minority.

5. When a state spends money to market tourism, it is spending taxpayers dollars. How much voice do you feel taxpayers should have in saying how the money is spent?

   Taxpayers should be encouraged to express their point of view. Much of the money spent to promote tourism can be attributed to the dollars that are brought into the state from the promotional efforts. Taxpayers must have the facts before they can become too vocal about their concerns.

6. If you were the state director of travel and tourism, would you promote gambling in your state, assuming that your state has gambling opportunities? Why or why not? To what extent would you let taxpayer opinions influence your actions in promotion if gambling?

   Answers would vary to this question. Have your students discuss the economic impact as well as the social and moral issues.

7. How should a state government promote travel opportunities in the state?

   A variety of promotional methods should be used by a state, just as they would be used by private businesses. Many states are now promoting travel opportunities through the Internet. Other useful promotional methods include travel brochures, radio, TV, direct mail, and more.

8. Should a state be concerned about the welfare of individuals who are involved with gambling activities? Or, should a state take a hands-off approach? Provide a rationale for your answer.

   A state needs to be concerned about all of its citizenry because those who are being supported by the state may never be able to break the mold to which they have been cast. The state can establish and enforce rules regarding gambling, but at the same time, the state must consider all those affected.

Case 29

The Case of the Dastardly Deeds—Discussion Ideas

By J. Calvert Scott

1. What are the dastardly deeds in the case?

   There are a variety of dastardly deeds in the case problem. They include a company salesman being arrested for soliciting, a worker's cigarette causing an explosion and fire, and a former employee's filing a sexual harassment case. Some might also argue that the self-serving attitudes of company executives also constitute dastardly deeds.

2. Do you think that the chief executive officer of Estrella Inc. is overreacting? Why or why not?

   Ultimately the chief executive officer of Estrella Inc. is accountable for what happens to the company. His future—economic livelihood, too—is increasingly jeopardized as news about problems at Estrella Inc. spreads outside the company. He has a right to be very concerned when things are not going well. Opinions about the degree to which he is overreacting will vary somewhat. While many will criticize him for wanting to fire O'Leary without having all of the facts, at the close of the case his statement is much less emotional and much more rational. Some may argue that given the seriousness of the problems facing Estrella Inc., he has every right to use attention-getting means to focus attention on and to resolve problems.

3. Do you think that a company should be concerned about what its employees do off the job? Why?

   Opinions about how far company concerns about employees should go beyond the workplace will vary. What employees do off the job may concern companies if the actions reflect unfavorably on the employer and/or involve the use of company assets. Companies can have their reputations damaged by inappropriate actions of employees, and if company assets are involved, could suffer financial losses as well.

4. To what degree do you think stockholders should hold the board of directors accountable for the actions of company officers?

   Most people are likely to think that stockholders as owners have the right to hold the board of directors responsible for the actions of the company officers since the board of directors is charged with the task of hiring and overseeing the work of the officers that it has hired.

5. Why were Bob Stonehill's charges against Mary O'Leary so attention getting?

   Bob Stonehill's charges against Mary O'Leary were attention getting because they counter the stereotype that males harass females. The dollar amount of the lawsuit and the charge that several levels of managers were aware of the problem but did nothing about it also contributed to the attention-getting aspects of the situation.

6. What are the economic and non-economic costs associated with each dastardly deed?

   The company salesman's being arrested for soliciting likely caused some people to purchase goods and services from Estrella Inc.'s competitors, reducing sales in the process. The unfavorable press and transmission of pictures of the company car at the crime scene likely damaged the reputation of Estrella Inc. in several non-economic ways. Replacing the damaged plant cost money, as did all of the sales that were lost while the plant was unable to produce goods. Since employees who were unable to work while the damaged plant was rebuilt received less income, their morale may have been damaged, resulting in less productivity when they return to work. It is likely that reduced pay caused some financially strapped employees to seek work elsewhere, ultimately increasing hiring and training costs for Estrella Inc. The sexual harassment lawsuit will cost the company money since at the minimum it must incur the costs associated with defending itself. If it loses the case, then it may have to pay millions of dollars. The unfavorable press will likely cause some customers to take their business elsewhere. Damage to employee morale and company image are more difficult to convert to money.

7. Do you think that the media acted responsibly when it reported negative information about Estrella Inc. and a few of its employees, information that depressed its stock price? Why?

   Opinions about the degree of responsibility exhibited by the media are likely to vary. Given the sensational nature of the dastardly deeds, some will argue that the media coverage was reasonable and that any reduction in stock price is attributable to failures within Estrella Inc. Others will argue that the media acted irresponsibly by blowing the dastardly deeds out of proportion and caused the stock price to fall because of its unfavorable reporting about Estrella Inc.

8. Someone once said that sooner or later, everything boils down to money. Was that person wise or a fool? Why?

   Opinions about the person who said that sooner or later, everything boils down to money will vary. Some will argue that the person was wise because he or she realized the power of money in the final analysis. Others will argue that the person was a fool because while money is influential, it is not the be all and end all.

Case 30

To Buy or Not to Buy – Importing—Discussion Ideas

By R. Luft

1. What must the Hartwells learn about importing products made in a foreign country before signing a contract with Chong's company?

   The Hartwell's have much to learn about importing products, but also about business, political, and cultural barriers. Because they were approached by the owner of a manufacturing company, they might have greater in-roads than someone who is making cold calls to international companies. They need to learn about importing, tariffs, taxes, and other technical details involved with the process. They should have any contracts reviewed by a lawyer who is familiar with international trade, specifically with Taiwan.

2. Where could the Hartwells go to learn more about the details of importing foreign-made products for sale in the United States?

   They might begin by searching the Internet for information on importing and might also be able to find information specifically on the company they are considering. They should also visit libraries, talk to other business owners who might be involved with importing, and possibly hire a consultant to assist them.

3. If the Hartwell's decide they want to import clothing from Taiwan, what would be the best way for them to do it? Should they work directly with Chong's agent, or should they be represented by someone more knowledgeable about importing than they are?

   The Hartwell's may not have a choice regarding working with Ms. Chong's agent. This may be necessary if they want to do business with the firm. It could be the only way that products are arranged for shipment out of Taiwan. Certainly the Hartwell's would benefit from discussing the situation with someone more knowledgeable than they. They might also want to employ their own agent to work with Ms. Chong's agent.

4. Where do you think companies like Nike, Reebok, Avia, Adidas, or Asics have their products manufactured? Look at some clothing items with labels to see where they were made. Are those five companies American companies or are they foreign owned?

   Large brand names have products manufactured all over the world. If your students look at enough labels, they might find, for example, that a certain style of Converse shoes are made in China and Korea, and the only way to know is to read the label. Of the companies listed in the case, Nike, Reebok, and Avia are American headquartered companies, while the other two are international.

5. What kinds of cultural differences are the Hartwells likely to experience in dealing with the Taiwanese? Should the Hartwells make a trip to Taiwan to learn more about the company and the country before closing a deal?

   They will experience cultural and religious differences that will effect their business dealings. Sometimes what is considered unethical in the United States is a perfectly acceptable behavior in another country. Taiwan is very "free enterprise" oriented and should be easy for the Hartwell's to adjust to. Religious differences must be determined so as not to offend anyone by saying, doing, or eating the wrong thing. Business people should always visit the country with which they are doing large amounts of business, especially in a situation like the Hartwell's are entering.

6. What are your recommendations to assist the Hartwells in their decision making process?

   The Hartwell's should study the situation, collect as much information as possible, visit Ms. Chong's company, consult with an attorney regarding contracts, consider a business consultant, complete a financial analysis, then make a decision based on what they know.

Case 31

Le Style Department Store—Discussion Ideas

By K. J. Kaser

1. What are the potential organizational conflicts in this case?

   Conflict between full- and part-time employees. Conflict between good customer service and smothering the customer.

2. What are the potential interpersonal conflicts in this case? Who are the key actors?

   See Number 1. Answers may vary. The key actors are LeStyle Department Store; Roger (full-time employee); Part-time employees; Customers; LeStyle manager.

3. How can these conflicts you identified be resolved?

   Develop a fair pay structure that is more consistent for all employees. Rule: the first salesperson to greet a customer helps the customer unless the customer requests a specific salesperson.

4. What would be an equitable formula for scheduling salespeople?

   This is a difficult scheduling dilemma that might not ever result in a win/win situation. Rotate the schedule for busy/slow weekend and night shifts. The full-time people probably have earned the right to work busy shifts.

5. What are the advantages of paying commission? Disadvantages?

   Commission gives sales people incentive to sell and it makes salespeople more attentive to greeting/assisting customers. Disadvantages of commission include frustration during slow times; no desire to work slow shifts; temptation to always tackle the "perceived" big customer.

Answer may vary for questions 6-8.

6. If you were a salesperson earning commission, how would you plan to ensure yearly financial soundness?

7. What effect, if any, could the current internal competitive solution have on LeStyle's ability to compete with vendors seeking the same customers?

8. What incentive system would you recommend? Provide a rationale.

Case 32

Horizon Training Services—Discussion Ideas

By C. Agneberg

1. What would you do if you were in Randy's shoes? Why?

   Answers will vary.

2. Do you trust John? Why?

   Answers will vary.

3. What legal options do you have personally since information about the company may have been misrepresented to you?

   Seek legal counsel and begin litigation against John and Bob for misrepresenting the company and the position you assumed.

4. What do you do in the face of the Kansas City branch being eliminated? Do you take care of yourself and begin looking for a new position? Or do you try to work out the continuation of the branch with John?

   Options include:
   a. Hold the meeting with Bob and the rest of the KC employees. Try to determine a course of action for the group in KC. Can any of the clients be salvaged to continue day-to-day operations of the multimedia development group? Should we form our own company?
   b. Follow John's edict—don't allow Bob back into the business. Work with John on how to close out the business in KC and consolidate everything up to Minnesota. Hopefully you can follow the consolidation up to Minnesota also.
   c. Because you have been employed for less than a week, leave the company and look for another position. Maybe even go back to your former employer and see if you can get your previous job back. Tell them you made a mistake when you left.

5. How could Randy have been so blind as to not see the negatives going on in the company before accepting the position with Horizon?

   Answers will vary.

Case 33

Marketing the Crown Royale—Discussion Ideas

K. J. Kaser

1. Who are the key actors in this case?

   Key actors are Georgia Jones (manager) and the Marriott Hotel and other competitors.

2. What are the major issues in this case?

   Major issues are attracting convention traffic to the Crown Royale Hotel, overcoming travel, weather, competition obstacles.

3. What qualities do you feel Georgia should be looking for in the managers she chooses for the successful team? Where should she acquire names of prospective candidates?

   Outgoing, knowledgeable people with negotiation skills, good listeners and people who accommodate the needs of different customers; managers who leave a positive impression for the hotel.

4. What are the roadblocks that must be overcome by Georgia?

   Limited airline travel to the city where her hotel is located, unfavorable weather conditions, size of the city and entertainment options, competition with the Marriott.

5. What markets will Georgia be addressing?

   Potential markets include all possible conventions and gatherings that require hotel and meeting rooms.

6. What do you think would be the most effective means of marketing this convention center? Why?

   Use the Internet, travel agencies, and convention planning organizations, and emphasize the state-of-the-art facility, restaurants, social activities, friendly people, and low crime rate.
   Advertise first within the state and neighboring states and then expand to broader national markets.

7. On which convention center highlights should the marketing program focus?

   New facility, good rates, social activities, friendly people, low crime rates.

8. What methods do you believe Georgia should use to contact prospective groups throughotu the U.S. to inform them of the Crown Royale?

   Letters to convention planners, Internet, ads in major newspapers in the state and neighboring states, radio ads, television ads.

Case 34

Techsystems—Discussion Ideas

C. Agneberg

1. What would you do if you were in Chad's shoes?

   Answers will vary. Some potential options Chad might choose follow:
   a. Continue to press Paul for a review time/date. Meet and discuss your performance. Agree to a salary adjustment and continue your working relationship.
   b. Begin prospecting for new positions immediately. Even if the review does take place, there probably won't be a salary increase. As soon as you can find a new position, leave TechSystems.
   c. Demand a review with/from Paul. Threaten to quit if the meeting is not held. Develop more of an adversarial relationship with Paul. Paul will eventually make it so uncomfortable for you that you will quit, be laid off, or eventually fired from the position.

Answers will vary for questions 2-8; some of the options above apply.

2. Would you begin looking for a new job?

3. Would you quit this position based upon the principle of Paul promising you a review?

4. Would you confront Paul and demand a review meeting?

5. Would you threaten to quit if you didn't get a review meeting?

6. Would you search out legal options at this point?

7. How could you bear to continue to work for Paul and continue to do an excellent job knowing that you wouldn't get any salary increase for your hard work?

8. Why do you think this happened to Chad?

Case 35

Promoting a New Business—Direct Mail Marketing—Discussion Ideas

By R. Luft

1. Is direct mail marketing the best approach for Rick to use in his young business?

   Direct mail is a good way for Rick to begin to get his business established without over-taxing his time. He does want to continue to do his other job full-time. The quality of his services is an important factor because that would influence word-of-mouth advertising, which could be more valuable than any other promotion. Some might consider direct mail to be very expensive because so much of direct mail goes into the garbage. If Rick sends direct mail using an envelope and first class postage, his material should be opened and read. Direct mail also allows the advertiser to target a specific market.

2. How should he conduct a direct mail marketing campaign in order to accomplish what he wants to accomplish?

   First class mail would work best for Rick's situation. He can obtain the names of the next senior class, hopefully in the form of mailing labels, and address mail to them directly. Because the number is somewhere around 200, Rick could sign each letter in order to personalize the mailing.

3. How important is it that Rick include prices with his direct mail letter?

   If Rick's prices are lower than other photographers, it would be beneficial to include a price sheet. Because Rick is new to the business, it is important that potential clients know of his lower prices. Low prices is not, however, a substitute for quality in something as personal as a senior portrait.

4. What types of promotional pieces (advertising) should Rick be developing if he wants to be successful in promoting his photography business?

   He might use business cards and perhaps promotional brochures for those who hear of his work and want information. Because Rick wants to maintain his other job, it would be difficult for him to schedule portraits at all hours of the day, and use of multiple media for advertising would be a waste of money. Word of mouth will be Rick's best form of advertising.

5. How do potential clients feel about selecting a local photographer who does not have an established reputation?

   Many clients would be skeptical to use someone without a track record; others would use someone because prices are lower; others wouldn't be concerned about not having an established record because they know that the portraits could be redone if they are terrible.

6. What other methods should Rick use to promote his photography business? Would it be more advantageous if Rick had a studio, or is it a good promotional feature to specialize in location photography?

   The amount of time Rick wants to spend with his business would determine the types of advertising he should use. Many people like to have their photographs taken on-location, but for others the studio is preferred. Having a studio would be more costly for Rick, but might also bring more business. Some people are reluctant to go into a home to have portraits taken.

Case 36

Reaching New Heights—Discussion Ideas

By R. McCauley

1. Should Jim keep his invention to himself or should he attempt to get a patent and market the ladder?

   The reality is that Jim will never really be able to keep his invention to himself. He has designed a product that has market value and in the entrepreneurial spirit should attempt to market it.

2. What might be his concerns in applying for a patent?

   Jim will need to get the respective forms and follow the procedures necessary to obtain a patent. He might also think about hiring a Patent Attorney. One more consideration is Jim's contract of employment. He must be certain that he does not have any obligations to his employer regarding inventions. Some employment contracts have stipulations that transfer the employee's patent rights to the employer, as an example.

3. As an engineer, does he have the "business know-how' to try to bring the product to market on his own or should he attempt to sell his idea to an organization already in the business?

   This is an important concern for Jim. He probably has limited business know how in every area necessary to bring the product to the consumer and he must recognize this and get help as needed. If he plans to contact a manufacturer to have them manufacture the ladder as part of their line, he should obtain his patent first. He has to appreciate, too, that his financial potential will be less if he chooses this second option. In this case, too, he should have the advice of a lawyer to best protect his interests.

4. How would he find out possible manufacturers and potential distribution channels for his invention?

   Jim can go to retail stores and take note of the information on similar products; he could use Thomas' Register to locate such businesses in his area as well. Searching the Internet is also a viable option.

5. What will he do to raise capital if he decided to pursue the venture on his own?

   Jim must prepare a business plan if he wishes to carry out this venture on his own. In his business plan, he must substantiate that there is a market, must propose investor returns as well as costs to manufacture, distribute, and market the product, and discuss his success to date in obtaining capital, as examples.

6. How can he get help in preparing the business plan that will be necessary in order to raise capital?

   The Small Business Administration of the U. S. government has regional offices that provide workshops, seminars, and consultants to those planning to establish small business enterprises.

7. How does he go about guaranteeing the safety concerns (ability to hold a specified weigh) of his invention by acquiring industry standard validation of that safety?

   He would need to locate the name and address of a validating agency such as Underwriters Laboratory, and get the step-by-step procedures explaining what needs to be done to obtain their seal of approval.

Case 37

The Case of Maximum Earning—Discussion Ideas

By K. C. Kaser

1. Who are the actors in this case?

   The actors in this case are Mary Gallegos, senior at Rose High School; the local supermarkets and individual customers.

2. What is the entrepreneurial activity?

   The entrepreneurial activity is culinary.

3. What are the opportunity costs for the entrepreneur in this case?

   The opportunity costs for the entrepreneur in this case are:
   a. Time
   b. Academic grades
   c. Social life
   d. Relaxation

4. What are possible alternatives to enable Mary to complete school successfully and continue the business?

   Possible alternatives to enable Mary to complete school successfully and continue the business are:
   a. Hire additional help for the next three months and take on more business
   b. Do not take on more business during the next 3 months and take on additional business during the summer
   c. Involve the family in the business operation to help with taking orders and delivery

5. Mary might consider raising prices due to demand for quality.

   What options might Mary consider to manage the prices of her baked items? Why?

6. If you were Mary, what would you do in this situation? Why?

   Answers will vary.

Case 38

The Case of Following the Leader—Discussion Ideas

By H. Perreault

1. What are the major issues of the case?

   Key issues include unwillingness to change, lack of communication, and an inability to focus on organizational instead of personal goals.

2. What do you think about Beth consulting Abby for advice?

   Beth needs to redefine her relationship with Abby. Abby can be a friend, but she is no longer Beth's boss. Students should list the mistakes Beth is making and consider how Beth's relationship with Abby is contributing to her making the mistakes.

3. What do you think Beth will tell David on Monday?

   Options for class discussion include—
   a. Accepts Abby's interpretation of discussion with David. Beth assumes the 50% assignment to evaluate technology is acceptable to David. She should talk with David to get clarification on her assignment.
   b. Criticizes David to other employees. She should give herself a period of time to adjust to the new environment and learn the reasons for procedures before criticizing them. She is letting Abby reinforce her negative attitude.
   c. Tells David what he should do. Beth needs to accept that David has a different operating style than Abby and that both styles have strengths and weaknesses. Beth seems to think she will be disloyal to Abby if she accepts David as her boss.
   d. Students may want to discuss what they think Beth will say and what Beth will need to do if she decides to stay. She will need to:
      1.) Determine how she can support her co-workers, David, and department.
      2.) Change her relationship with Abby from mentor/boss to friend/coworker.

4. What differences in leadership styles do you see between David and Abby?

   Students can list some positive leadership traits possessed by Abby and by David.
   a. Abby—Built a cohesive team attitude. Encouraged team members to be self motivated.
   b. David—Set and maintained standard operating procedures such as placing assignments in folders on a set schedule and setting specific working hours. Respected people's time by not calling unneeded meetings and by scheduling appointments.
   c. When a company reorganizes, workers need adjustment time and a supportive atmosphere. Some of the characteristics of both Abby and David are needed—team building (Abby) and standard operating procedures (David).

5. If you were David, how would you have handled the reorganization?

   More personal contact and more discussion on expectations would be appropriate. David could have helped Beth and Jeff by setting new goals and welcoming their expertise.

6. How do you think Abby should have been treated during and after the reorganization?

   There is not information in the case to substantiate Abby's suspicions that upper management was threatened by her success. Students may suggest that Abby be given more information on the reorganization and on the role she is expected to play in the customer service department.

7. What could David have done when Beth and Jeff received their new assignments?

   David could have spent more time making Jeff and Beth comfortable in their new assignments. He could have assigned a current worker in the department to act as a mentor and to "show them the ropes."

8. Who do you think needs to make an attitude adjustment?

   Beth needs to change. If Beth is willing to make a change in attitude, what barriers will she encounter?
   a. David's expectation that she will try to undermine his authority.
   b. Abby's disappointment that Beth is not continuing the work of the team.
   c. Co-workers' perception that Beth is a trouble maker.

Case 39

Will the Entrepreneurial Spirit Continue?—Discussion Ideas

By K. Shrader

1. What are the Romeros options? What are the advantages and disadvantages for each option?

Option 1
Ownership goes to son; stay at same site; let son run the business; parents work for the son until they retire
- Advantages
  - *accommodates easy retirement
  - *Carl gets good start
  - *keeps current personnel and family setup
- Disadvantages
  - *new mall renovation may change customer base
  - *the atmosphere may not remain authentic Italian
  - *little independence for Carl
  - *less space

Option 2
- Relocate and form a new restaurant with Carl
- Advantages
  - *remains family-oriented
  - *does not lose six months of income
- Disadvantages
  - *expansion/moving costs
  - *possible loss of customer base

Option 3
- Relocate and form two restaurants (mall space and one new establishment)
- Advantages
  - *son's independence
  - *6-month delay at mall provides good start up opportunity for new restaurant
  - *establishes new clientele
  - *provides for possible short-order business and authentic Italian business
- Disadvantages
  - *expensive start-up costs
  - *new business ventures may require new techniques (marketing and food service)

Option 4
Remain at present business and conduct business as usual. Carl does own thing, possibly cater.
- Advantages
  - *independence
  - *less start-up costs
  - *easy retirement
- Disadvantages
  - *loss of "family" business
  - *less space at mall

Option 5
- Inquire about possible expansion at mall
- Advantages
  - *mall may draw new clientele
  - *keeps current clientele
  - *more room to accommodate ongoing business
- Disadvantages
  - *may lose authentic Italian look
  - *expansion costs
  - *higher rental costs

2. What involvement should Carl have in helping his parents make a decision? Do their options change if Carl decides not to be involved in the restaurant business?

Question 1
- *The decision should be family-based on the wants and desires of all members.
- *Carl's input is invaluable if Romero's is going to continue once his parents retire.

Question 2
- *The decisions become short-term instead of long-term.
- *It is less likely that dollars will be expended on mall expansion or on new businesses.

3. Is there something the Romeros could have done to avoid having to make these difficult decisions?

*plan at the time Romero's was established for the possible inclusion of Carl
*consider lease terms and time lines
*initiate open conversation with Carl and involve him in the decision making

4. What other questions should the Romeros be asking themselves and others before making a decision?

*What are Carl's desires?
*How long before the parents want to retire?
*How much will renovation cost?
*What is the competition remaining at the mall?
*What is the demand for an Italian eating establishment?
*What is the financial status?
*What is the motivation for operating a restaurant?
*What other vendors remain at the mall?
*What is the success rate of other vendors who have closed for renovation at the mall?

5. When they reopen what new (if any) marketing strategies should they employ? (answers vary with option choices)

a. Target (depends on choice of options)
   *Individuals who like Italian atmosphere/food
   *Middle-aged couples
   *Executives (luncheon customers)
b. Same. It is already well-known.
c. Menu Choices (same unless they select the option to operate two restaurants)
   Mall—specialty items; fast food items
   New Establishment (restaurant not in the mall)
   Retain "old Italian" menu
d. Pricing Strategies
   *depends on competition
   *depends on new mall costs
   *raise if mall food is packaged as an express restaurant with new format, servings, and packaging
   *keep the modest price for restaurant (it's working)
e. Location (see options)
f. Promotional Strategies (varies with options)
   *newspaper (local)
   *radio (local)
   *promotions for local executives
   *advertise at the mall for the other restaurant and vice versa
   *display signs on wall at mall indicating "coming soon"
   *coupons

g. Describe Carl's role in the business once they open at a new or existing location. (answers will vary)
*depends on Carl's wishes as well as his parents
*long-term decisions if Carl is the potential owner
*decisions depend on Carl's ownership options
1) Partnership? Separate businesses? equal say
2) Manager? day-to-day operational decisions
3) Employee only? as granted by parents

Case 40

An Interpretation Everyone Can Understand—Discussion Ideas

By S. Lund-O'Neil

1. Is integrity an issue in this case? If it is, identify potential integrity problems.

   Integrity could be an issue and probably is. The integrity problems may include slanted interpretations and marketing "claims that cannot be substantiated."

2. How is it that Henry and Katy could have such different opinions? Who is right? Why?

   There is not always a clear cut way to determine who is right or wrong. Most of anything is interpretation and attitude. Neither is necessarily right or wrong. He's a "company man" with a protective attitude since he has invested in the organization. Also, he has his reputation at stake as well. She could be native or a high-risk player. He did what was necessary by assisting her. She was chosen to lead—it is her responsibility and the responsibility of those who chose her.

3. What are Henry's options regarding his discomfort with Katy's actions?

   He has already spoken to her. Any further discussion may be interpreted as a non-team player. He can let go of the situation and protect himself by proper documentation of his data. If his stress level is high and not manageable, then it may be time to move on.

4. If false claims are made publicly without discovery or jeopardy to BJT's customers, should Henry tolerate the situation quietly? Why or why not?

   False claims are unethical. How serious are the "false" claims in relation to his "values."

5. If Henry becomes a whistle blower, what repercussions might be ahead of time?

   Frequently, whistle blowers are "punished." Be prepared for the consequences, which might include ruination of his reputation, loss of current and future benefits, and un-employability.

6. Put yourself in Henry's place and determine what crossing the line mans for you.

   Crossing the line means I have all the facts and I know that serious harm is likely to occur to innocent people. A decision must be made by Henry to either leave before he damages his career or accept the leadership he is under.

Case 41

The Case of the Curious Partner—Discussion Ideas

By D. McAlister-Kizzier

1. Who are the key actors?

   The key actors are Jody, Joe, Larry and Rebecca.

2. What are the major issues in the case?

   Major issues in the case include the legal and ethical issues of a business owner reviewing employee's email files.

3. What are Joe's options?

   Joes' options are:
   a. to comply with Rebecca's request and print out Larry's email files before the close of business company's legal counsel about the legality of printing out the file, yet retaining Rebecca's confidence
   b. to tell Rebecca that he is uncomfortable with her request and he needs some time to investigate the legalities and ethics of her request.
   c. students may generate additional options

4. If you were Joe, how would you respond to Jody's request?

   Answers will vary. They should provide a rationale for their answers.

5. Is Jody's request legal? Explain your answer.

   Legally, employee's email messages are the property of the business. Jody's request was legal; she may have a rationale for her request that involves the future welfare of the company.

6. Is Jody's request ethical? Explain your answer.

   The ethics of Jody's request are questionable. She is violating Larry's (and possibly Rebecca's) right to privacy, did not appear to consult her business partner, and she did not give Joe a reason for her request. The context of the request appeared suspicious. However, it is possible that she had a valid reason for her request (see number 5).

7. What are the potential implications for Joe if he complies with Jody's request? If you were Joe, what steps would you take to protect yourself from potential negative consequences?

   Rebecca is placing Joe is in a tough spot with her request. If he complies, he could be at the center of a potential serious conflict between Jody and Rebecca. The action could cost him his job, or, at a minimum, violate the trust of key personnel in the organization.
   To protect himself from negative consequences, Joe should consult legal counsel before accessing Larry's files. Students can brainstorm other steps that he could take to protect himself. Joe may want to consider if he wants to continue his career in this organization.

8. Why do you think Jody does not want Rebecca to know about her request?

   Students should brainstorm potential reasons and the implications of each reason. For example, Jody may suspect sabotage from Rebecca and/or Larry that could affect the future of the business. Or Jody may be a suspicious personality who does not trust anyone. Jody could just be curious.
   The legality, ethics (including integrity) and personal dynamics will provide interesting class dialogue.

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Case 42

The Case of Falling Off the Career Ladder—Discussion Ideas

By H. Perreault

Discussion ideas:

a. Have students list characteristics that describe a strong supervisor, for example: sets goals; delegates responsibilities; respects coworkers; sets a good example; listens to suggestions and concerns; and communicates expectations

b. Have students list characteristics that make Judy a good candidate for the supervisory position, for example: experience in position (she was in charge when supervisor was unavailable); sets and communicates expectations; provides detailed guidelines on completing tasks.

c. Have students list the characteristics that make Judy a poor candidate for the supervisory position, for example: projects an uncompromising attitude; is unwilling to delegate; and needs to be in control of every situation.

Case study questions:

1. Do you think it was justified to deny Judy the promotion because of her reaction to the joke?

   Vote on if the mimicking incident was what cost Judy the promotion. (Remind students that no information on Marilyn's abilities is given in case.)

2. What do you think Barry meant by Judy having "paid her dues." Discuss the merits of "paying one's dues" as a criterion for promotion.

   Paid her dues could mean making sacrifices for company, working for several years without advancement opportunities, or working at non-supervisory positions for a few years. Being loyal to company may be considered in a promotion but one's characteristics and ability will have more weight.

3. Should any action have been taken regarding Juanita's mimicking of Judy? Why or why not?

   Students may feel discipline action is warranted, but others may question if any rule was broken. A more important question may be to examine the others who were at the table and laughing. Are they as "guilty" as Juanita?

4. Do you think it was best that Juanita left the company? Did she deserve a strong recommendation? Provide rationale for your answers to these questions.

   List other options to resigning for Juanita, for example: ask for a transfer to another department; apologize to Judy; or stay in current position and continue to work with Judy in a professional manner.

   Marilyn may feel that having Juanita leave will prevent problems in the future between Judy and Juanita.

   What information does an employer gain about a potential employee form a letter of recommendation?
   - Level of skill and experience.
   - Aptitude to learn new skills and processes.
   - Ability to work with co-workers.
   - Commitment and work habits.

   As a potential employer, students should indicate if the mimicking incident would influence their decision to hire Juanita.

5. Discuss the integrity of a member of the promotion committee using the "how to eat your lunch" joke to illicit a response from Judy regarding her lack of a sense of humor.

   Students may suggest the committee members should have asked Judy to give examples of how she has handled specific situations. It may seem inappropriate to put Judy in an embarrassing situation when she is under the stress of an interview. Others may feel that it was very appropriate because the management position requires someone who stays focused and does not get upset when workers disagree or are acting in a childish manner.

6. Discuss the integrity of Karen sharing the reason for the personnel committee selecting Marilyn.

   Karen should not have shared the information. Co-workers would have been disappointed to not get the information, but they would have understood her not telling.

Case 43

The Case of Wrong Pricing—Discussion Ideas

By R. Luft

This is a case that for many students will be clear and, without a doubt, easily answered. For others, they will struggle with the honesty of the situation.

1. Was Jeff wrong in purchasing the cables for $5.96 when he knew that most places charged about $36 for them?

   Students must realize that there is often a large price difference between specialty stores and discount stores on the same items...often the same brands. In this situation, the difference to be considered should be between $5.96 and the other two prices Jeff was told. Some students would say that since Jeff pointed out the differences on more than one occasion, the store had ample time to correct their mistake. Other students would say that Jeff should have just paid the $15. 96 as it was scanned and not said anything about the shelf price being wrong.

2. Is it the store's fault that they weren't getting the price they should have for the cables?

   Yes, it is the fault of the company . . . perhaps not this individual store, but whomever enters the prices into the computer from which the scanner is retrieving prices. A store does have some obligation to sell the product to a customer for the price at which it is priced on the shelf.

3. Jeff gave the store an opportunity to correct their mistake and find the actual price of the cable after his first visit. Why wouldn't the store make the correction?

   Often employees in large chain stores don't care enough to see that corrections are made; it could be that the employees got busy and forgot to make the correction; it could also be that the employees weren't trained well enough and didn't know how to make sure the changes occurred.

4. During the first visit, what rights did Jeff have to demand the store sell the cables for the price that was marked on the shelf?

   If Jeff can show the store personnel that the price on the shelf for the specific item was incorrect, the store is obligated to sell it at that price. Often customers will place items in the wrong location, but if numbers on the item match the numbers on the shelf sticker, the store is wrong and should sell at the marked price.

5. Was Jeff being honest throughout his dealings with the store? What would you do?

   Jeff was honest with the store from the beginning. The only thing he could have done was to tell them that the same item is priced as high as $36 in other stores. He had no obligation to do comparison shopping for the discount store

Case 44

The Missing Keys and Password—Discussion Ideas

By J. Schoen Henry

General Discussion:

Gabe had been warned by the Department Chairperson, Dr. Smith, that Mr. Richard was going to cause problems with the new system management and that he would support Gabe in his new job. Given this offer of help, Gabe should have involved Dr. Smith when Mr. Richard did not come up with the keys and passwords as promised. Younger and relatively inexperienced workers should rely on the help available from the management to support them in their problem solving. In this case, Gabe's decision to take care of the situation himself resulted in a near breakdown of his ability to function. Note that the result Gabe wanted to avoid, involving Dr. Smith, was exactly what must have happened when the new computer system was not ready in time for the start of classes.

Some specific action that Gabe could have taken:

a When Mr. Richard said that the keys were at home and that he would provide them the next morning before he left for vacation, Gabe might have offered to go with Mr. Richard to get the keys and passwords immediately, on the pretext that he needed them in order to do some work that evening. Then, depending on Mr. Richard's reaction, Gabe could have gone to Dr. Smith at that point.

b. At the first opportunity after taking the new job, Gabe might have tried to meet with Mr. Richard to discuss how they might cooperate to phase Gabe into the job. By stroking Mr. Richard's ego, Gabe may have been able to get a different reaction from Mr. Richard regarding the keys and passwords. Even if Mr. Richard was totally uncooperative in a first meeting, a failed attempt would have warned Gabe what to expect in any future dealings with Mr. Richard.

c. Dr. Smith should be kept up to date on the progress on any project as important as the installation of a new computer system, including any problems

Case 45

Paying for Potholes—Discussion Ideas

By K. J. Kaser

1. Who are the key actors in this case?

   Key actors are State Senator Carole Green; Carlos (a lawyer); and Ron (truck driver).

2. What is the problem in this case?

   The key problem is raising money to pay for road repairs.

3. What are alternatives to solving the problem? What are the advantages and disadvantages of each alternative?

   Alternatives to solving the problem, with advantages and disadvantages, include:
   a. Excise tax on gas:
      positive—ready source of funds; users of roads more likely to pay
      negative—higher prices on gas.
   b. State income tax increase:
      positive—ready source of funds
      negative—not always fair . . . some pay quite a bit more than others; not popular with most voters.
   c. Toll road fees:
      positive—a great deal of revenue; everyone pays
      negative—too many other demands on sales tax; not all contributors benefit.

4. Which solution should Carole choose and why?

   Answers will vary according to #3 reasons.

5. To what degree should Carole consider her upcoming re-election bid when deciding upon an alternative?

   She should not consider her upcoming re-election bid in her decision; however, most politicians look out for their political futures.

6. If you were a constituent in this state, what solution would you recommend to your senator? Provide a rationale for your proposal.

   Answers will vary. Look for sound rationale for students' proposals.

Case 46

A Tough Career Choice for March—Discussion Ideas

By S. Lund-O'Neil

1. What facts and information should Marcy collect about the job market? Where should she go to get such facts? Why should she consult several sources?

   Marcy should go to the public library to research trends in the marketplace. Historical data as well as predictions should be considered. It would be useful for her to be aware of the world economy as well as the local economy. After considering the collected data, she will be able to make a reasonable prediction of any possibilities for her advancement. One source can either cause frustration or a false sense of assuredness. It is likely with each additional source, she will get just a bit more information to make a balanced decision.

2. Might it be helpful if Marcy would make a list of career options and find out what it may take for each? Why or why not? What other kinds of lists (likes, dislikes, strengths, etc.) would be helpful for Marcy to make?

   It would be helpful to make a list, because as she sees the requirements she will be making decisions that "she CAN do that," or "I DON'T like that" or "Maybe¼," as well as prompting new questions of "HOW can I accomplish that? All along she is making decisions. Other lists could include what she wants to be, do, and acquire in 5, 10 and 20 years. Make lists of people and companies employed in the fields of interest. Listing her likes, dislikes, strengths, and weaknesses would be helpful along with the realization that life experiences will alter her lists. Visualizing her perfect day will be helpful. She should include details such as the time she arises, what she wears to work, and physical environment. Does she sit at a computer all day, does she have ineraction with people—in person, in the office, in the field, only by phone of email. The list should include her evening hour activities in detail through to the time she goes to bed at night. How does her ideal job compare with the proposed job.

3. Is it likely that Marcy has all the facts from Jill, Mr. Bradford, and the community college advisor? If not, what course of action would you recommend for Marcy to get more information?

   Talk to the personnel department (HR) of several companies. No one person has all the facts. If she hears the same information several times it should be an alert to take notice.

4. If Marcy decides on college, how can she be sure she has selected the right career path?

   She cannot be sure—there are no guarantees. If the subject (major) interests her and if she finds herself positively challenged, she is probably in an appropriate field in which she can be successful.

5. Make a list of the factors that Marcy needs to consider when making her decision. Build into your list the factors (and rationale) that Marcy needs to consider to assure she will be prepared for a entering a career in two to five years and will have job mobility after that as the job market continues to change.
   What is the job market now and what are the projections for the next 2-5-10 years.
   Will the field be saturated, wide-open, or level.
   How will the skills learned in one field transfer to another field.
   Is she willing to relocate.
   How can she stand out positively from other graduates? Has she actively participated in volunteer work, summer work, of internships in chosen field, or has she been an active member of a professional organization?

Case 47

Choice is an Individual's Greatest Power—Discussion Ideas

By R. McCauley

1. Assess Ramona's discontent with her present job situation.

   One can relate to Ramona's discontent. She is a young lady unable to establish friendships due to frequent relocations. She has no incentives to "dress up" for work and she is primarily working in a man's world. On the other hand, Ramona can be proud of her work history, her promotions, and her current involvement in the management-training program. The organization obviously has a great deal of confidence in her abilities and potentials to meet their needs.

2. Are there avenues within her company other than earning an MBA degree by which Ramona can achieve her goals?

   Ramona needs to make it known to her superiors that she has an interest in the corporate side of the business and the reasons she has this interest. Perhaps if her superiors are sensitive to her interests, they might be able to arrange opportunities for her to take part in seminars and training that would enhance her work opportunities on both the corporate side as well as the production side.

3. Are there alternatives that Ramona might consider to achieve her goal of graduate study?

   Instead of going for graduate study for two years full time at an expensive school, perhaps Ramona should consider doing MBA study part time in the evenings. This would help her make friends as well. Since she does relocate a great deal, however, she must be certain that the credits she earns are at an accredited institution and are courses that can be transferred.

4. What are some suggestions that Ramona can pursue to minimize her indebtedness should she decide to do full-time study at the institution she selected?

   There are often scholarships available for graduate study. Ramona should pursue scholarship opportunities. Women's organizations, Hispanic organizations, as well as alumni organizations often provide scholarship assistance to deserving students—Ramona might just be one of them.

5. If you were Ramona, what decision would you make?

   This response represents a student's opinion.

Case 48

The Fast Track at City Hall—Discussion Ideas

By S. Lund-O'Neil

1. Add to the list of questions suggested by Ms. Youngblood that Ken should seek answers to as he considers applying for the position. Then, identify a plan of action Ken should take to get answers to the questions.

   Why did people leave the positions in the DA's office? How often do opportunities exist to apply for positions in the DA's office? A plan of action might include visiting the DA's office, even if it is on the pretense of delivering something. Then attempt to identify people in the office, determine if people are accessible to conversation or to an invitation to coffee. How are they dressed? Does tension exist? Is there an intense or relaxed atmosphere?

2. What major factors may contribute to Ken's decision to apply for the position in the DA's office?

   After his self analysis and department analysis, if he thinks that he would fit in the climate and culture of the DA's office and that the change would meet his immediate, intermediate or long-range goals. Ken may choose to decide to apply to the DA's office.

3. If Ken applies for the position and it is offered to him, how should Ken's long-and short-term goals enter into his decision whether to accept the position?

   The decision is now with him to determine if and how much the position detracts or meshes with his goal. This may in turn call for him to reevaluate his goals before making a final decision.

4. Draw some conclusions about your suggestions given to Ken. Why is it not a good idea to conclude: "every DA's office is similar" to the one where Ken works and, thus, "every government agency has similar characteristics"? Expand upon your conclusions.

   An office takes on the personality of the leadership and support staff. It's leaders, promoters and detractors contribute to the personality of the office, therefore, all offices are not the same. He may be in a supportive office because they utilize co-operative education, which usually indicates willingness to train. A move to another department may require independent or teamwork without guidance and little interpersonal communications. He current office may be involved in mundane activities and the new one may be involved in a variety of projects that call upon more diverse knowledge and experience which he might find challenging.

Case 49

Now What?—Discussion Ideas

By K. Shrader

1. What are Mary's Options?

   a. move and take new position
   b. accept buyout and look for new position

2. Are there options not presented in this case?

   Ask to remain at Redarsh in a new position, lose benefits

3. What are the major considerations in this case?

   a. earnings
   b. family
   c. marriage
   d. benefits
   e. lack of education
   f. loss of retirement
   g. moving expenses

4. What are the advantages and disadvantages of each option?

   Option 1—move and take new position
   advantages—more money, keep job, financial status, opportunities for advancement
   disadvantages—distance from Alex, move from family
   Option 2—stay and become unemployed
   advantages—near family and Alex
   disadvantages—unemployment, retraining needs

5. What kinds of educational and personal experiences have provided Marcy with the job skills to make her successful at Redarsh International? What implications do these skills have upon her career options?

   a. concentrated high school education on business courses
   b. enrolled in community college courses
   c. dependable high school employment
   b. work ethics, likeable, fast learner, dependable

   These skills explain her promotions and make her more employable with her good recommendations, resume, and contacts.

6. Are there career development decisions that Marcy could have made that would have helped her avoid these decisions?

   a. other part-time employment
   b. additional college instruction and night school
   c. learn the responsibilities of several positions at Redarsh
   d. define her long-term goals better

7. What recommendations do you have for Marcy should she accept the new position?

   a. talk to Alex
   b. explore long-term opportunities at Redarsh
   c. train for other positions after the move
   d. talk to employer about employment opportunities for Alex

8. What recommendations do you have for Marcy should she reject the new position?

   a. establish short- and long-term goals
   b. get training
   c. ask for good references/contacts from Redarsh
   d. ask Alex about job leads, know his long-term intentions

Case 50

Responsibility as a Team Player—Discussion Ideas

By M. Chalupa

1. Examine Julie's attitude toward being a team player.

   Students may respond with ideas as closed minded, very independent, one way to accomplish task, not considerate of others' points of view. Julie thought she was helping the team; she may not understand the team concept.

2. What is the problem?

   Whenever there is a change in the team membership, the team needs to go through the team building stages to rebuild. All other problems are symptoms.

3. What should Kyle, Jack, and Rochelle do now? Evaluate your opinions for short-term and long-term results.

   Kyle, as team leader, could talk to Julie privately and commend her on the positive actions. Kyle should explain how a team operates and encourage her in that the others are trying to help her be a team player.

   Jack and Rochelle, each privately, can visit with Julie and compliment the great work she did and indicate they understand how difficult it is to join a team in mid project. Julie should be made aware of the client's objectives and how important it is to meet those objectives. Background information on the client may help Julie understand why the "one way doesn't fit all."

4. Discuss what responsibilities one has as a member of a team.

   Recognize interdependence and understand both personal and team goals are accomplished through mutual support. A climate of trust allows for open expression of ideas and opinions and disagreements and questions. Recognize that conflict is normal and can be opportunities for new ideas and creativity; all work to resolve conflict constructively. All participate in decisions affecting the team but leader makes final decision whenever team can't decide or an emergency exists. All members will be successful or all will fail as a team.

5. Discuss what responsibilities one has as a team leader.

   A team leader must set ground rules, see that all participate, and be visionary. A leader must inspire teamwork and mutual support and be proactive. A leader must motivate people to get involved and committed. Encourage and facilitate, not dictate. Communicate fully and openly; welcome questions, recognize individual and team accomplishments at the right time and appropriately. A team leader must be committed and expect the same in return from the members.

Case 51

A Day in the Life of A Systems Analyst—Discussion Ideas

By T. Lundgren

This case will be a day in the life of Dave Watkins, a systems analyst with the DENRO company. DENRO is a Fortune 500 company with a large Information Systems (IS) Division. There are about 60 maintenance programmers, 40 new system programmers, and 45 systems analysts in the Applications Department. Dave began with the company four years ago as a programmer. He got the job on the basis of two years experience programming in COBOL in a mainframe environment and a bachelor's degree in business.

This case shows a day in the life of a programmer-analyst or systems analyst. The distinction is not clear and companies define the terms differentially. The general theme is that a person in an Information Systems analyst position performs a wide variety of activities, many of which are not directly related to the skills typically associated with systems analysis. Of course, while this might be a typical day, it really was distilled from the activities covered over an entire week.

1. Since many systems analysts have a programming background and programmers do become systems analysts, why not eliminate the distinction and make both positions programmer analysts? Some companies have moved in this direction. Why would you keep/not keep the distinction between programmers and analysts?

   It is important to keep in mind here that we are talking about what to name the position, not the duties and activities associated with the position. There are both direct and indirect reasons for this distinction. Some possibilities are:

REASONS TO KEEP DISTINCTION	ONLY PROGRAMMER-ANALYSTS
To focus on the different duties	To focus on the common elements
...	...
To have a career path	To emphasize the team perspective

2. Do you think that you have all of the necessary skills and traits to be a systems analyst? If not, what specific skill or trait would you develop to be a successful systems analyst?

   One of the points of the case example is to show that technical skills alone are not sufficient. The systems analyst must also have good communication skills, interpersonal skills, and good personal organization (remember the regular references to the ToDo list!). Certainly technical skills are necessary, but they are not sufficient to be a successful systems analyst. So this is a bit of a trick question in asking what specific (single) skill or trait would make a successful systems analyst. The correct answer should list technical skills, business skills, and social skills. An interesting aside here is to discuss the "techno-nerd" with abundant technical skills who is lacking in social skills and how they fit into the Information Systems picture.

3. Students who are interested in a career in systems analysis and design have commented that they can't wait to get into the real world where they can concentrate their efforts on a single project, unlike the conflicting demands of different courses during their student days. Based on the case study, is this likely to be an accurate picture?

   Recall the old saw that Dave tells the group at the 12:00p lunch. The point is that the college graduate thinks that they are knowledgeable and ready to do great things while the seasoned veteran knows that the college graduate is really unable to do the simplest things. This theme has been prevalent in Information Systems for decades and will undoubtedly continue. So this question has a direct and an indirect answer.

   First, there will be at least as many conflicting demands in the real world. Secondly, and more subtly, the recent college graduate should recognize that the real world may not accord them the respect and esteem that they believe their degree carries.

4. Considering this case study, what does a systems analyst do? How does a systems analyst spend their time? Make a general list of activities for Dave and how much time (in hours) he spends in each activity.

   Since the case study is not an activity list, there is some flexibility in listing what Dave did on this particular day. The activity list should be fairly general and probably have between five and ten items on it. For example:

ACTIVITY DESCRIPTION	HOURS
Arrange for physical facilities	.5
Deal with replacing project team member	1.2
Develop survey form	1.25

5. Really, could this case study actually occur? What parts of it seem to be a bit exaggerated?

   From the introduction to this section, you know that this case could occur, but it is actually based on a composite of activities that covered an entire week. A listing of those parts that may seem to be a bit exaggerated might include the initial call at 4:22 a.m., and the seemingly endless round of short-term appointments. Dave seems to do very little direct work on his current project! However, analyses of the activities performed by systems analysts suggest that this case study is typical.

   An interesting activity might be to list those things that Dave did not and would never do. Given the case study information, this should turn out to be quite a difficult task. Another discussion item here would be the time frames involved. Is it typical for Dave or any systems analyst to be on call apparently 24 hours a day?

6. Recall that Dave's project manager (Barbara) asked him to informally interview a candidate (Stephanie) for the project team replacement. Dave knew that he was being asked to determine how well Stephanie will fit into the team. Suppose that Dave did not "hit it off" with Stephanie on a personal level, but realized that she was certainly qualified. What should he tell Barbara?

   This question is intended to illustrate the non-technical aspects that are involved with the systems analyst position. These types of situations are often referred to as political situations because they involve structural power elements that must be resolved before the work at hand can be resolved. There is no right answer, but there are answers.

   The typical business answer, based on business productivity and longevity, is that Stephanie should not join the team because not "hitting it off" with Dave is very likely to cause future problems on the project team. It should be cautioned however, that first impressions are not always accurate and that it is possible that Stephanie will be a significant asset to the team.

7. This Case Study is atypical in that CASE is used. The fact is that the majority of systems analysis and design is done without CASE or CASE tools. How would the Case Study be affected if the CASE were removed? You should be able to mention several specific changes and effects.

   This is straight forward. Starting with the first CASE item at 9:25a when Dave makes a change to a DFD and does some housekeeping, it is clear that the CASE is saving a lot of detail time. Each CASE incident can be noted (3:00p, 4:00p, and 4:50p) and discussed in terms of the time savings.

   An interesting topic here is to discuss how CASE might be extended to help handle other aspects of the systems analysis job.

Case 52

If We Do All That is Necessary, the Odds Are in Our Favor—Discussion Ideas

By R. McCauley

1. What personal characteristics does Amy possess that are suitable for the new position?

   Ambitious, good interpersonal skills, good presentation skills, project orientation, enthusiastic, as examples.

2. What work experiences can Amy describe that complement her preparedness for the new position?

   Successful track record with end users; corporate training success; and upward career track with the organization.

3. What skill sets has Amy demonstrated that are appropriate for the new position?

   Good interpersonal skills; negotiation skills; presentation skills; project management skills; ability to work with employees at all levels in the organization, as examples.

4. What specific activities should Amy undertake to best prepare for the interview in general terms?

   Carefully think through the job specifications and how her qualifications match the responsibilities; rehearse answers to questions that she believes might be asked; get plenty of sleep to be at her best for the interview; bring along any supportive information that might be helpful; dress conservatively and appropriately.

5. How should Amy prepare herself to demonstrate how she can "determine business problems and prepare technical solutions?"

   Refer to successes that she has had in her role as Systems Analyst and Senior Analyst and cite specific involvement and effectiveness of each.

6. What might be a specific recommendation that Amy might make in response to item 5. Develop this idea more fully.

   Point out a known "corporate information processing problem"—i.e. high cost of researching information. Discuss how the use of an online service could cut costs in the area and bring along evidence of an example whereby the costs were tracked manually as well as by using the online service.

7. What ideas can Amy suggest by which she can "demonstrate how she can "head the technical education of the Executive Team?"

   Conduct 'briefing sessions" regularly; prepare an Executive Newsletter highlighting issues; arrange demonstrations of new technology; share the result of research garnered from surveys of competitors; arrange for in-house loans of equipment; present the ongoing result of productivity surveys with suggestions for improvement through the use of technology as appropriate.

8. Take one specific idea from your response to item number 7 and develop that idea more fully.

   Recognize that optical disc storage can enhance the filing/finding of legal documents and attempt to create an awareness of this process to members of the Executive Team. Survey and report the current ratios regarding retrieval time and filing accuracy and demonstrate how the new system would enhance both ratios. Demonstrate the return on investment over time as a result of a new system as well as other value-added benefits.

Case 53

California Bound—Discussion Ideas

By R. Schramm

1. What do you think Cheryl's chances are of getting a job interview using the Internet?

   Her chances are improving every day. Companies are increasingly using the internet as a place to conduct national searches. Submission of a resume on the internet is one way of showing the employer you are computer literate.

2. Identify any Uniform Resource Locator (URL) addresses on which Cheryl can post her resume.

   Use Yahoo or a similar search engine to find appropriate URL sites.

3. Identify any URL addresses that Cheryl can use to find job postings in California on the Internet.

   URL can be found using Yahoo or similar search engines.
   Dependent on URL used.

4. If Cheryl asked you to create her resume for posting on the Internet, how would it look?

   The instructor should describe some jobs and organizational activities Cheryl may have participated in. Students can then develop a resume for Cheryl using standard format and various other styles.

Case 54

Was It a Slip of the Tongue?—Discussion Ideas

By R. Luft

1. Was Charles Crowly being a responsible manager in saying what he said to Rene?

   Charles Crowly was speaking out of turn in talking to Rene. It was not his job to do so and he could cause problems with the Vice President who has the ultimate decision making authority. Charles was apparently being Charles...not very responsible.

2. What should Rene do or say following this coffee conversation?

   Rene should leave the situation alone. If she became real interested in the position when it is available, she could let it be known at that time. If she really wants to push the situation, she could confront Charles about it, however, he may deny everything.

3. What do you think were the motives of Charles Crowly?

   Charles apparently wants Rene to think he has more to say than he might. This could be normal thinking for Charles. He may have other **personal** motives also.

4. What might happen of Crowly's boss, the Vice President, found out what happened? Is it Rene's responsibility to talk to the Vice President?

   Rene doesn't need to talk to the Vice President, at least not immediately. If she develops a deep interest in the job, then she might want to talk to the VP. The Vice President would likely overlook Crowly's actions and dismiss them as unimportant.

5. If you were the Vice President and found out that a conversation like this had taken place at this point, what actions would you take?

   Student's reactions will vary. Some might think that Crowly should be fired, others will say forget it; other will think that Crowly should be taught a lesson. Have your students discuss their feelings and reactions and why they think as they do.

6. If Charles Crowly often spoke out of turn at Bennett Company, how much credibility should Rene give to the conversation? Should she take him seriously about his offer or should she just forget about what he said? Why?

   Rene should forget what Crowly said until the position becomes fully available. She will then have to make a decision regarding her compatibility with Crowly as a supervisor before she can make a decision to pursue the opportunity.

7. If you were writing an ending to this scenario, how would you write it?

   This will vary.....have fun with it, but make the students justify their closing statements.

Case 55

A Dog Wagging Tale—Discussion Ideas

By D. McAlister-Kizzier

1. Who are the key actor(s) in the case?

   Sally, Billy, Jim, faculty members, department chair

2. What are the key issues(s) in the case?

   Department morale
   Faculty turnover
   Departmental productivity
   Administrative support
   Departmental leadership, especially reporting/management control and loyalty
   Equity in workload for faculty and staff
   Identify of work priorities
   Students may identify other issues

3. If you were Jim, how would you handle requests for support from all faculty members (those faculty supported and those not supported by the previous secretary)? Provide rationale for your response.

   This is a difficult issue with no easy resolution. Jim is new and without a strong power base based on position or experience and Billy's personality is manipulative. Jim needs to ensure that she can handle her job responsibilities; she should not be expected to do her work in addition to Billy's work. Possible options for discussion include:

   a. Talking frankly with Sally, Jim's immediate supervisor, about how Billy's attitude is affecting his ability to fulfill his assigned job responsibilities. The bottom line is that the faculty and chair need to have adequate clerical support and the support responsibilities should be distributed equitably. The focus needs to be on the overall objectives and goals of the department, not on personalities. Billy is trying to manipulate faculty and clerical staff to simplify her job. As office manager, it is Sally's responsibility to foster an environment that ensures office support needs are being met.
   b. Confronting Billy directly. As a newer employee than Billy, this would be risky; however, it may stimulate open and frank discussion that could lead to altered behavior from Billy. Jim needs to stand up for his rights. He should document incidents in which faculty request his support because of Billy's manipulative behavior.
   c. Working with Sally and Billy to reconfigure job responsibilities to better suit the personal and professional strengths of the office personnel, yet be equitable. Each staff member has unique strengths and weaknesses that can be valuable to the department.
   d. Take the problem to the chair, with written documentation and attempt to come up with a viable solution, focusing on department goals.
   e. Temporarily take on the increased responsibilities, while working with Sally, Billy and the chair to reconfigure the job responsibilities to be more equitable.
   f. Student may generate additional options.

4. What are Sally's options?

   a. To confront Billy and work with her to change her attitude.
   b. To provide Billy with training.
   c. To follow organizational policies to discipline Billy for documented behavior.
   d. To reassign Billy to another department.
   e. To document in written form the instances in which Billy has attempted to manipulate faculty to not meet support needs. Then, to meet with the department chair and Billy to reconcile the problem.

f. To reconfigure the work responsibilities to better match staff strengths and weaknesses; perhaps Billy's strengths can be used in such a way that she can maximize her technical expertise without being in a position to control resources and manipulate faculty. Working with the both Billy and Jim in designing the realignment would enhance acceptance and commitment.
g. To implement, with input from faculty and the chair, a priority system to assist in determining job priorities. Perhaps Billy was feeling overwhelmed with faculty demands and used the three tactics mentioned in the case to control her workload to a more manageable level.
h. Students may generate other options.

5. If you were Sally, what actions would you take? Why?

Answers will vary. Look for soundness of the student's rationale.

6. If you were an external consultant brought in to analyze the quality of support in the department, what strategies would you recommend to resolve the problems described in the case? Explain why you selected these strategies.

Answers will vary. Look for the soundness of the rationale.

7. What do you think the faculty member meant by the department being one in which the "tail was wagging the dog"? What are the implications for personnel working in this kind of environment?

Faculty members were frustrated because they perceived Billy was attempting to manipulate them and it appeared she was allowed to get away with the manipulation through the support of the chair. Faculty perceived that Billy was allowed, with the chair's support, to decide what jobs would be supported and which ones would not be supported. Billy was not in a position to be aware of department priorities or faculty expectations; however, faculty were in such a position. Through Billy's manipulation tactics and the chair's defensive support of her tactics, faculty perceived that support staff were being allowed to determine department priorities. The implications for personnel are potentially very serious. Department morale suffers, leading to such negative outcomes as sabotage, turnover, absenteeism. Productivity suffers and the ability to meet the demands of the job is hindered.

In the actual case upon which this scenario is based, the actual implications were serious. Attempts to reconfigure workloads were not successful, the chair refused to listen to faculty concerns. Faculty finally went to the Dean (the chair's supervisor) with their concerns well documented, after trying to work with the chair to resolve the support problems. The chair and all support staff except Jim were re-assigned to another department, new support staff were hired, and another faculty member was assigned to the chair position. After the changes were implemented. After the personnel changes were implemented, faculty and staff productivity and morale improved.

Case 56

Nellie's Two Personalities—Discussion Ideas

By M. Chalupa

1. Why do you think Nellie's behavior changed after the probation performance review?

   Students may have a variety of responses. Some employees behave appropriately when they know they're being watched and change when not being watched. Nellie feels secure now that the probation is over so she may become her true self. Nellie may have changed because she is in a power position over the others.

2. Discuss why you feel Nellie behaves differently toward Reed.

   Reed is in a power position and Nellie feels that he can help her be successful. Nellie may feel threatened or insecure by the others. Nellie may feel that they can't help her be successful like Reed can. However, most often the subordinates can help one be successful or not successful.

3. Why do you think Nellie's behavior toward the interviewer was more sociable outside the office?

   Nellie could not ignore her colleague as it wouldn't look good. Some will describe Nellie as a "climber" or "user."

4. What is considered appropriate socialization in the workplace?

   This is an opportunity for students to brainstorm the pros and cons of socialization in the workplace for different fields of specialization and the affects it can have on people.

5. What would you recommend Sharene do, if anything, about Nellie's "two personalities"? Evaluate the potential results of your recommendations.

   Students will have a variety of recommendations. Realistically, there are three options: (1) do nothing, (2) find an appropriate time to chat with Nellie about the workshop and suggest next time the two attend together, 93) Confront Nellie about her split personality.

   Students should examine the potential results of their recommendations. Doing nothing is always an option. Option 2 mentioned above can bring about positive results for Sharene and Nellie. Option 3 above will probably bring about negative results, more so for Sharene.

6. Do you feel Nellie's behavior is appropriate or inappropriate? Provide a rationale for your response.

   Whichever way students respond, the rationale is important. If appropriate, Nellie may be afraid to get too close to subordinates, her supervisory style is more autocratic. If inappropriate, Nellie needs to realize that what her subordinates think and say about her is just as important to her success as what her superiors think of her and her behavior.

Case 57

Technically Qualified by Lacking Self-Management Skills—Discussion Ideas

By M. Chalupa

1. What is the real problem? What are some symptoms of the problem?

   The problem is Cassie hasn't been trained to be a supervisor. Students may suggest the following symptoms as problems: Reports not done on time, lack of time management, Cassie works through breaks, lunch, stays late, etc., to try to catch up.

2. What are alternatives for Cassie to think about? Evaluate the alternatives for short-term and long-term results.

   Cassie needs assistance in adjusting to being a supervisor if she wishes to continue in a supervisory capacity. Cassie may decide that she prefers her previous position; she needs to think about the long-term consequence if she decides she does not want to stay in the supervisory position.

3. What, if anything, could Kyleigh do to help Cassie? Evaluate the options for short-term and long-term results.

   Kyleigh needs to talk to Cassie about the role of a supervisor and could give her some pointers on how to delegate and what to delegate. She could suggest books to read to help Cassie understand the supervisory role. Cassie could use a mentor to help her adjust to the supervisory role; this could be Kyleigh or another supervisor. Cassie needs training in how to compile reports as well as general supervisory training.

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Case 58

What Went Wrong?—Discussion Ideas

By J. Barton

1. What are the major problems in the department?

   Many problems are apparent in the Purchasing Department:
   a. Harris' management style has caused major problems in the department.
   b. Staff members resent and do not respect Harris.
   c. Morale is low.
   d. Productivity has declined.
   f. Communication lines are closed.
   g. The department is understaffed.

2. Since the staff was so loyal to John, Clark, is it likely that they would show resentment toward any person hired for this position?

   It is unlikely that the staff would be resentful toward any person who replaced Clark. Harris' management style was the complete opposite of Clark's management style. Staff members would probably accept a new manager until that person gave them reason not to accept him or her.

3. Identify Harris' management style.

   Harris' management style is completely authoritarian. He is reluctant to delegate responsibilities, keep open communication lines, or trust experienced employees to do their jobs.

4. Should the five persons who resigned have waited until after June to give notice?

   Even though June is one of the busiest months in the department, the five persons who resigned gave adequate notice in order for their replacements to be hired. Although it would have helped the department if they had stayed until after the busy season, they were under no obligation to do so.

5. Did Harris exercise poor judgment in waiting to fill the five vacancies?

   Harris definitely exercised poor judgment in waiting to fill the vacancies until after the five persons had left the department. Not only did this delay in hiring result in the department being understaffed, but a problem will also arise in training the new hires. Harris will probably not trust anyone but himself to train the new employees. With his finger in every pie, how will he be able to do his own job effectively?

6. Considering the circumstances, is it possible for the purchasing department staff to regain their high morale and efficiency?

   Unless Harris changes his management style, it is unlikely that the departmental staff will regain their high morale. Low morale adversely affects efficiency and productivity. Once morale becomes low, it is hard to rebuild. In only five months, the morale and productivity of the departmental personnel has plummeted. It will take many changes on Harris' part to rebuild the spirit of teamwork that previously prevailed.

7. If you were in a position of authority over Harris, what would be your recommendations for resolving the many dilemmas in the purchasing department?

   A person in authority over Harris must, first of all, be aware of what is happening in the department. This person needs to make sure he/she has all the facts and then have a talk with Harris concerning the problems that have developed. Harris will need to be told that he will have to take measures to increase productivity and raise the morale of his staff members. If Harris is not willing or able to do this in a given time period, and if all problems have been documented, Harris may be transferred or terminated.

Case 59

The Case of the Changing Transcript—Discussion Ideas

By K. C. Kaser

1. Who are the key actors in this case?

   The actors in this case are Nancy (student), Denny (student), and the Southern University transcript office.

2. What are the conflicting issues in this case?

   The conflicting issues in this involve love vs. cheating for an individual.

3. What ethical dilemma does Nancy face?

   The ethical dilemma with which Nancy is faced is whether to raise grades when they haven't actually been earned by Denny.

4. What could happen to Nancy if she decides to change Denny's records?

   If Nancy decides to change Denny's records, she could jeopardize Denny's and her professional futures. Nancy will always have to live with her decision.

5. What is an alternative way that Nancy can help Denny?

   Several alternatives might exist and answers may vary; one obvious alternative is for Nancy to help Denny study to improve his grades.

6. What would you do if you were Nancy?

   Answers may vary.

Case 60

Information Systems Training Corporation—Discussion Ideas

By R. Schramm

Note: The instructor should update the information in the Discussion ideas as technology changes.

1. Do you think Kate should upgrade or replace the training lab equipment?

   PC Machines—

Type:	Industry Standard IBM compatible 486DX2 machines
Speed:	40 MHZ
RAM:	8 Megabytes
Hard Drive:	250 Megabytes
CD-ROM:	None
Modem:	None

   Server—

Type:	Industry Standard IBM compatible 486DX4 machine
Speed:	66 MHZ
RAM:	16 Megabytes
Hard Drive:	540 Megabytes
CD-ROM:	None
Modem:	None

   Kate should upgrade the training labs to Pentium based systems.

2. What are the advantages and disadvantages of upgrading the training lab equipment?

   Upgrading the training lab with more RAM and larger hard drives would cost less. The equipment would still be too slow to efficiently run new software.

3. What are the advantages and disadvantages of replacing the training lab equipment?

   Replacing the training lab will provide you with proper equipment for now and the immediate future. The cost of buying new equipment will probably exceed $18,000. She must decide to spend more money or limit the purchase of new equipment.

4. If you replace the equipment, is there any part of the older PCs that Kate could use with the new equipment?

   She can use the RAM, monitors, keyboards with the new machines. She may also use some hard drives as secondary hard drives on some machines.

5. What sources of information are available for Kate to rely upon?

   Kate can rely on several PC magazines, local vendors, information from the internet/web, and colleagues at other organizations in the area.

6. What would be the minimum computer type, speed, RAM, hard drive, and modem requirements you think Kate should consider?

   Kate should not consider less than a Pentium 200 MHZ, 32 MB RAM, 1.6 GB hard drive, and 33.6 modem.

Case 61

The Problems with Database—Discussion Ideas

By T. Lundgren

The Illso Corporation has had an efficient Information Systems Division for many years. Almost a decade ago, they made the change from a manual, forms-driven methodology to a CASE methodology. Approximately three-fourths of the present computer information systems have been successfully developed with the CASE application. A current project involves a reengineering approach, which will create a new computer information system which integrates data and processes from many departments across the organization.

This case study demonstrates some of the practical problems that occur in the development of an information system, especially one that has a common database. This case was used to show the incredible variety of ways that people use for names and how they must be accommodated. Even simple and standard items like people's names can cause unexpected problems. Another lesson in this case study is that workers in information systems should not assume that they are familiar with the specific problems in other business areas.

1. Integrating systems that use personal names as data will continue to be a problem for the systems analyst. Discuss the possibility of an intelligent parser that can determine who an entered name really refers to. Such an application could be used to remove duplicate mailing list entries.

   A parser takes an alphanumeric string of characters and makes sense out of it in terms of existing definitions. An intelligent parser has an extensive set of instructions and definitions that allow it to make accurate decisions. What we want is a parser intelligent enough to assign the same identity to Chuck, Chas and Charles if there is other evidence such as same street address or same phone number. An interesting exercise here is to extend this idea to the example Jane gave of the names used by Mrs. Worthington Smyth. It is likely that you will conclude that such an intelligent parser is not feasible.

   Another interesting theme here is how to deal with duplicate names in a mailing list. This is a costly problem and will continue to be so.

2. In the case study, five components of a client's name were identified. Would you change the length of any of the fields?

   This question is an opportunity to list the longest titles, names (first, middle, and last), and name suffixes that might be possible. There should be a discussion then of the longest possible length that should be set for each field. Finally, discuss how the field data is be used and how that may affect the field length. For example, if the names are to be used for billing, then perhaps the original field lengths in the case study will be adequate. Alternately, if the names are to be used for personalized letters, then we may wish to use longer fields to guarantee that we obtain the full names.

3. Which of the five components of a client name that were identified should be classified as optional as opposed to required? Which component(s) are absolutely necessary?

   The answer to this question must begin with the specification of how the client name will be used. Once this is defined, for example, as only on address labels, then the components can be rank ordered for importance. In this example, you would probably rank last name as the most important component and suffix as the least important.

4. Defining data elements is an integral part of a data dictionary. Given the discussion that occurred in the case study, what other information should be stored in the project dictionary?

   The case study does not give any good leads here except that we are concerned with client names. The usual candidates for inclusion are client address and some type of client identification. Like the client name, the client address can harbor a host of unexpected problems. An interesting exercise is to list the possible fields in client address with the definitions of Name, Type, and Length.

5. In the case study, technical reasons were invoked to explain to the participants that data components had to be defined in terms of their maximum field length. Doesn't this sound a bit questionable?

   There is no reason this could not be explained in everyday terms. Most experts in the Information Systems field advise against using technical concepts and terms, especially in a JAD (Joint Applications Development) meeting because jargon usually reduces the immediate and resulting interaction and communication as well as reinforcing the "us and them" feelings.

   An explanation could follow the lines of data storage capacity for explaining the length requirement by pointing out that variable length fields must also contain space to store the field length while fixed length fields do not need this, but they will waste space by storing spaces if a field is not filled with characters. Of course, it is always acceptable to simply say that the application requires such definitions so everyone is in the same boat.

Case 62

Information Systems Alternatives—Discussion Ideas

By T. Lundgren

The Jecorin Company provides temporary services for large organizations. These services are in the area of external administrative services such as executive security, company picnic arrangements, and providing accommodations for visiting personnel. Jecorin has a regional office in most major cities coordinated by the corporate headquarters in Dallas, Texas. The corporate offices have used mainframe information systems for many years for standard business functions.

This case study is intended to show the changes that are occurring in the computer information system field with the widespread use of the microcomputer as well as the increase in computer applications in general. Information System departments that were traditionally mainframe shops are moving toward the inclusion and integration of microcomputers into the entire business strategic planning process.

1. Should the Jecorin company seek an existing information system used in another, similar organization as a solution to their problem?

   This would be a good move. Because there were very, very few alternatives in hardware and available software in the mainframe days of the 1970 and 1980's, it is still relatively common practice for mainframe IS shops to offer only one alternative to the development of an information system: Use the existing hardware and write your own software. Today there are more mainframe alternatives, but nothing compared to the wide availability of microcomputer hardware and software. Mainframe alternatives are often marketed by an Information Systems department that developed an application that could be used by other similar organizations.

2. Is the Jecorin company illustrative of a general trend toward the development of computer information systems at a regional level to deal with regional conditions?

   Yes. This trend has been called the advent of distributed computing with very little, some, or all of the processing power of the system residing at the client (the regional offices). Another important and contributing trend is networking which is also being strongly influenced by the unanticipated spread of the Internet.

3. What is the best word processor available today on a microcomputer system? Be prepared to defend your response.

   A first response to this question is often based on the inherent speed, features, and interface of different word processors. However, in a business setting, the first criteria would be compatibility with the existing system, followed by things like ease of installation, availability of support, the cost license structure, and finally, if at all, the features of the application.

4. What are the characteristics of a state-of-the-art business microcomputer system? For example, what is the best CPU, how much RAM is desirable, how large a hard disk is necessary, and so on.

   Answering this question should involve reference to some of the popular microcomputer publications to see what is available. To be a bit more specific, the business might be specified, for example a small newspaper office, or a large life insurance company. In any case, the type of hardware available at any given time is fairly consistent and not too variable. Most evaluations consider only a few basic types of systems: The power high-end business system, the budget business system, and the home market.

5. What is the best brand of microcomputer hardware system on the market today?

   The popular microcomputer publications regularly poll their readership and along with other evidence, they report tiers of hardware manufacturers based on overall scores composed of reliability, support, and other value considerations. Of course, if we are talking about a specific organization, then the major consideration must be compatibility with the existing hardware. A check with an Information Systems department will probably yield an official list of the approved hardware.

6. (The above questions have been leading to this one.) How do you know what alternative hard/software systems are available? In other words, how did you obtain your information to answer the above questions?

   The answer to this question should involve a listing of the popular computer publications associated with the type of system being considered. The trade publications should be mentioned here (like PC Week, InfoWorld, ...) as vehicles for making this type of information available. There are trade publications for virtually every area of computing and systems work. Finally, the Internet is a potential source of information of quite a different source here.

7. What criteria should be used to evaluate potential computer information systems that appear to be suitable for a proposed system?

   This is the problem that was not solved in the case study. It was not clear how Bill intended to get this information or what criteria he intended to use. This problem does not occur at the same level with mainframe systems. Of course, the criteria must be based on the requirements that are usually produced in the initial stages of the SDLC. But these requirements might not be sufficient or detailed enough to be useful. Sometimes, it isn't until after the system has been installed and implemented that it is discovered that some aspect of the hardware is unsuitable. This is an argument for prototyping.

Case 63

Workflow Reengineering—Discussion Ideas

By T. Lundgren

The Hopeman Corporation produces heavy equipment for industrial use. Their production facilities have been automated for many years and they are able to successfully compete on the international market. Hopeman places much emphasis on their excellent Information Systems Division (ISD) for the development and maintenance of the computer information systems used in the production area. The ISD has been well supported in terms of personnel and budget and they enjoy considerable status at Hopeman.

This case illustrates some of the obvious and some of the subtle problems associated with business process redesign or workflow reengineering. The general idea is to step back and begin with the larger picture first rather than beginning with each of the current work processes. Though not always true, it is common for workflow reengineering to result in the elimination of some existing processes and thus some workers. The apprehension of workers that this might occur is a major, though usually understated, concern.

1. Do you think that organizations should be concerned that we often add computer support to outdated and inefficient business processes so that we end up with a computer information system that makes the same old mistakes?

   This may be too harsh an indictment because it sounds as if we are deliberately computerizing old business processes by simply replacing manual methods with computer support. For example, changing from typewriters to computer word processing would do little to increase productivity unless we also took advantage of templates, macros, networking, etc. However, notice here that adding more technical computer support such as macros and templates may not change the fact that three different people must access the same document in sequence. Perhaps we can change the way the document is accessed so that only one person needs to process it. This is the point of workflow reengineering detailed model of the current system as it presently operates (the physical system) and then abstracts that system to produce an ideal logical system.

2. This alternate approach is the more traditional SDLC (Systems Development Life Cycle) perspective. A standard approach is to begin with a fairly detailed analysis of the current system to see what the problems are so that we can direct our solution to dealing with these problems. However, the case study correctly points out that "we don't want to spend too much time on a system that we want to replace." In other words, we don't want to make the current system a better system, we want to through it out and replace it with a new model that accomplishes our goals with more efficient methods.

3. In what ways can reengineering cause people problems? Consider the effect when it is pointed out that a process is contributing little or no value to a system.

   Reengineering almost always causes people problems as noted in the introduction to this section. Many of the people involved typically have the idea that they are going to lose their jobs. This makes it difficult to develop the new model since there tends to be a focus on preserving the current situation. To deal with these types of problems, standard reengineering practices focus much more on the logical model without specific referents. This makes it somewhat easier because specific people and processes cannot be so easily located.

   Because of the persistent people problems in reengineering, it is also common to call in a reengineering consulting firm to perform the task. This allows some of the inevitable hostility to be transferred to the consulting firm who will then leave when the reengineering is completed.

4. What questions should come up in terms of systems and subsystems when developing a system model for the Hopeman AS department?

   Because we are dealing with the system as a whole, it should be easier to see how the system can be integrated with other existing systems. The most obvious associated systems will be those that feed the input to the system under study and those that receive the output from the studied system. In general, workflow reengineering often is extended to the entire business even if only one system is selected for the initial testing.

   Actually, the case study is atypical in that AS (Administrative Services) is selected for workflow reengineering because that department is one of the most linked systems in any business. It is usually much easier to do the workflow reengineering on the AS input subsystems first, followed by the AS subsystem, and then the AS output subsystems.

5. Workflow systems are designed to work with the flow of documents in electronic formats. Will workflow systems lead to the paperless office? Discuss.

6. Probably not as much as we might like. But it will certainly lead to people handling paper less frequently. The paperless office is more related to people's acceptance of electronic documents rather than our technical ability to avoid paper.

7. The Hopeman ISD is willing to incorporate business process redesign operations into its charter. Do you foresee any problems with other areas viewing this as another "empire-building bid by the computer people"? Discuss.

   This is always a potential problem when a department increases its control in an organization, and especially true because of the history of most Information Systems areas. IS has been similarly accused when they attempt to control the acquisition and use of microcomputers. Better internal public relations can be very useful here.

Case 64

Talent and Discipline—Discussion Ideas

By T. Lundgren

Bill Sammond, a systems analyst at Fortune Life and Casualty, had just returned from lunch. He was involved with a project team to install a new system that had been purchased to add a complete annuity line to their products. The new annuity system was a complete package that was fully documented, tested, and in use at a number of other insurance companies. The annuity products in the new system needed only some slight adjustments to fit the line of Fortune's proposed annuities. Then the package had to be integrated with the present company system. The project team had been able to move quickly through the analysis stage and were now beginning the design stage. They estimated that only 12 to 13 weeks would be required to complete the design stage for the integration of the 132 program modules of the new annuity system with their present life and casualty system.

This case shows a common problem in large companies. One of the company sub-units purchased a microcomputer system for their own, personal, internal use with no intention of ever merging with the larger company computer system. In many cases, the sub-unit comes to realize that they cannot reasonably remain independent from the larger information systems. Then the problem of integrating with the larger system becomes much larger than simply "connecting" everything together as significant incompatibilities emerge in hardware, software, and processes.

1. Should Bill have volunteered the services of the Information Systems department to help the Actuarial department with their problem? Should the Information Systems department take over this application and make it work for Actuarial?

   Remember that Actuarial had purchased the system with the approval of Information Systems (IS) under the conditions that it would "only be used in our offices for internal actuarial work . . . " and that Actuarial had chosen Pascal as the programming language which was not supported by IS. Realistically, IS cannot help Actuarial much with their problem and Bill did more than expected or required. The hardware, software, and processes are incompatible and would require a major resource commitment to correct. It is unlikely that any IS department in this situation would volunteer to help Actuarial.

   This type of situation has resulted in most major companies being very restrictive concerning the acquisition of computer systems. The point is to avoid this difficult situation which cannot be solved without the loss of significant resources. For example, here it is almost certain that all of Pete's clever Pascal programming will be a loss. Unfortunately, the severe IS restrictions on computer system acquisitions are usually viewed as just another attempt to control the world. And, yes, sometimes this is true.

   There is no win-win resolution here and this should be recognized. Both IS and Actuarial will have to give up some control and expend significant resources to get anywhere.

2. How much does program size affect the ability to test effectively? Is there any good reason to limit a program's size?

   All computer experts agree that the ability to test effectively increases faster than the program's size. In other words, a program twice as large will take more than twice as long to test effectively. The data on this suggests that the relationship might be exponential so that a program twice as large might take four times as long to test. In any case, everyone agrees that once a program reaches a certain size, it is quite literally impossible to test all aspects of the program.

   The generally accepted solution is to limit program size in the sense of functional modules. The idea is to build the program out of separate modules that perform a single function. We can test each module. Then we combine the modules and test their integration by testing the program. Then we combine the programs into a system test and test the system. Of course, we know that complex applications with many modules and programs may not ever by fully tested.

3. Suppose the Actuarial department returns to the original version of their Pascal program which works fine. Then they let Pete code an entirely new program just for the new annuity system. This saves them some time compared to Bill's suggestion. What are the consequences of this decision?

   It is virtually a certainty that this action would only put the problem off, to be re-encountered at a later date—and with more significant consequences. Keep in mind that if Pete leaves this company, Actuarial will be in a horrible situation when one of Pete's programs fails to operate as expected. And no, hiring another Pascal proficient actuarial candidate is not the answer.

   Though letting Pete do the new program will solve the problem of the moment, it is essential that Actuarial become integrated with the IS standards. This is a classic case of short-run resolution versus long-run solutions. Over the life of the company operations, the short-run resolution will cost significantly more than the long-run solution. Unfortunately, this is a difficult perspective to accept for many businesses.

4. Consider a small office with only one of two microcomputers with standard word processing and spreadsheet applications. If a special program is needed and written by the office staff, is there really a need for program documentation and program flowcharts if the program works?

   This question is the heart of the entire case. It is asking if we need procedures and documentation for computer processes. Though all IS professionals would answer a resounding "YES" to this question, there are many, many pressures to avoid and minimize procedures and documentation. Too many computer applications today have no useable documentation resulting in considerable difficulties and costs when changes or enhancements must be made.

   During the 1990's there was a tendency for structured methods to go overboard and to attempt to document every possible element of a computer system. Many information system developers chafed at requirements to comment every lien of code, to provide complete diagrams of input/output, and to provide documentation. Most IS people today realize that over-documentation and over-processing can slow down and even impede the development of a computer application. Though it is not clear where the process and documentation line should be drawn, current thought says to at least draw it somewhere (see e.g., McConnell, Steve. *Software Project Survival Guide*, MS Press, 1998).

Case 65

Computer-Assisted Systems Engineering—Discussion Ideas

By T. Lundgren

General Apparel Inc. has continually kept up with the state-of-the-art in information systems technology. The Information Systems Group recently installed a comprehensive CASE (Computer-Assisted Systems Engineering) which includes an excellent project management module. Installation of the CASE and appropriate training for the personnel took over six months and management was concerned that the system would be productive. The Systems Review Committee carefully deliberated on the possible projects to be used with the new CASE to find one that would be representative. The New Projects Manager selected experienced information systems professionals for the project team.

This case illustrates some of the possible benefits of CASE (Computer-Assisted Systems Engineering) in a large Information Systems department. While the case example illustrated here is very positive, it should be kept in mind that CASE tools have not been adopted by many Information Systems departments.

1. If a Fortune 500 company is considering a CASE product for their information systems division, what is the first step they should take?

   As suggested by the case example, there should be a planning stage to consider installation of CASE, training of the appropriate personnel, and determination of how the CASE will be implemented. In the example, the CASE was implemented on a representative pilot project rather than throughout the Information Systems Group. The point here is that the CASE should be treated as an information systems application where the end-users are the Information Systems Group itself.

2. Do you think that time estimates of SDLC activities would be fairly accurate, consistently low, usually high, or just not very reliable?

   The example showed that SDLC (System Development Life Cycle) activity time estimates had to be changed when users requested another report and changes in some input screens. The time estimates required change when new terminals entered the project. And the time estimates required change when it became clear that the original project estimates were too low.

   In general, this is a common situation in project management. Due to unanticipated events and insufficient information, time estimates will require regular revision and those revisions will almost always be higher. So we can say that initial time estimates of SDLC activities are not likely to be very reliable and usually too low. Note that this is probably not due to poor time estimates of the activities themselves, but because of unanticipated events and insufficient information.

3. Do you think that CASE could effectively replace a systems analyst?

   An interesting and provocative question that is often asked of CASE vendors attempting to sell their systems. The standard answer is that CASE could probably reduce the work hours of a project team to allow a smaller team to accomplish as much as a team with one or more additional members. In effect, CASE could replace person-hours. However, the types of activities followed by a systems analyst in the usual information systems project go far beyond the capabilities of CASE.

4. Some companies have purchased CASE and after two-three years have yet to see the benefits. What might be the problem?

   One way to approach this answer is to encourage all possible responses. Almost any idea as to the problem here could be correct. The instructor can start a list and when the responses begin to slow down, explain that it is often to pinpoint problems in this type of situation.

   This situation has occurred more often than desired, but we really should not be surprised given the track record of all information systems projects. We have been searching for the silver bullet to solve this sort of problem for over twenty years now with little success. (See, for example, Frederick P. Brooks, *The Mythical Man-Month*, 1975 and the later

anniversary edition.) The lesson here is that this situation prevails in many, if not the majority, of our information systems projects. Unfortunately, the answers are not clear or forthcoming. Our best guess is that information systems applications need time to mature and to become integrated into our work styles and into other business systems.

5. Comprehensive CASE products include a project management module. How important is it to integrate project management with CASE?

   Regardless of all the other components in CASE, the project management module is likely to be the most important. It is widely acknowledged that if an information systems project does not follow some type of project management, then it is doomed to failure in meeting time and resource estimates. On the other hand, just because a project management module is used does not guarantee success.

6. What elements of analysis and design in the SDLC could never be replaced with a CASE module?

   CASE cannot replace the "people" element in the SDLC. CASE certainly cannot make decisions on the usefulness or desirableness of adding a report or changing the input screens. CASE provides the support to help make those decisions. CASE cannot determine if the number of hours for a particular activity are accurate, nor even if a particular activity is necessary. A speculative approach here is talk about the role of decisions support systems and artificial intelligence in CASE.

Case 66

Joint Application Development—Discussion Ideas

By T. Lundgren

Jim Dalby, the New Projects Manger for ACME Financial Corporation is very concerned with one of the new projects for bringing policy records online. This project is planning to change the policy records department from a manual, paper-based operation to a computerized, image-based system. Susan Johnson is the project manager and the project has apparently become bogged down in the systems design phase.

This case is an example of how JAD (Joint Application Development) can be a useful tool for dealing with a very common problem in computer system application development. In any information systems project, resolving the end-user requirements is always a difficult task for a number of reasons. A major point of JAD is to efficiently and quickly determine a project's requirements to the satisfaction of all involved parties.

1. It has been observed that sometimes users do not really seem to know what they need in a computer information system. Do you think that this is true?

   There is no question that this is true. The problem is that users and everyone else know what they need when converting a paper-based, manual system to a computer information system - they want the same capabilities only faster and more reliably. This is neither difficult nor problematic and, it is not the problem. The problem is that when users see what a computer information system can do, they want it to do those things and those things are often far beyond what the old manual, pap-based system could do.

   A good way to approach this question is to first acknowledge the above, and then consider a computer information system like the example policy records system. Given that the computer system can easily duplicate the old manual, paper-based system, what else would users like it to do? The usual response is to generate new queries and reports that were not possible with the old system.

2. If a project team's analysts and users are not getting along well, could an all day session doing JAD cause even greater problems?

   This is always a possibility when people are involved. A JAD session might well increase hostilities and permanently impair team interactions to the detriment of the project. For this reason, most JAD consultants will be careful to involve a number of people from upper management, even the CEO, for at least part of the JAD session to emphasize the importance of working together, or the costs of not working together.

   It should be recognized that any JAD session will need to deal with interpersonal conflicts among the people involved.

3. What do you think it costs to rent a JAD room for a day? Because of the real variability of the answer, explain what your cost estimates are based upon.

   The answers here will be based on current consulting costs, requirements of the business, location of the business, and similar factors. The cost estimates should include these factors along with the sophistication of the JAD environment, which may range from relatively crude poster and black boards to full-scale computerized setups. Ballpark estimates should be in the $1K - $10K range. A point of discussion here is to note that a JAD room in the business, even a very large business, might not be financially reasonable given the limited use patterns.

   If there is a JAD provider in the area, they will often be pleased to provide this information. It may be possible to rent a JAD room for class activities at a very reduced rate from the JAD provider.

4. Obviously, a JAD session can rapidly produce prototypes for evaluation. In what other ways might a JAD session be useful in the SDLC?

   Although a JAD session can make increase social difficulties on a project as noted in Question 2 above, it can also be deliberately used to deal with these kinds of problems. In addition, a JAD session may be used to simply get everyone together, to increase the feeling of teamwork on a particular project. Using a JAD session this way should not, however, be done without professional help.

   Technically, a JAD session can be used anywhere in the SDLC (System Development Life Cycle) to deal with problems although they are most commonly used to set initial requirements. For example, if it is not clear how to proceed with the testing phase of a complex system, a JAD session might help set acceptable parameters.

5. Would it be feasible to use an extended JAD session of perhaps a week or two for all of the systems analysis, design, and development phases of a project?

   Probably not. The interaction is likely to be too intense over that long a time period and of course the costs are likely to be prohibitive. In addition, the people involved would need access to their own development tools to accomplish work on the project.

   On the other hand, a small group of dedicated people working on a well-defined project that could be completed in a short time frame with access to the appropriate resources might be able to compress many aspects of a project into an intense, long JAD session.

Case 67

The Value of Systems Analysis—Discussion Ideas

By T. Lundgren

Acme Pipe and Cable have 32 regional offices in 14 states. The corporate headquarters in Grand Junction, Colorado have been steadily losing the paper war. Each month there is an ever-increasing pile of invoices, purchase requests, sales slips, and requisitions. Requests and information arrive and are recorded, checked and cataloged, approved, ordered, filed, and eventually verified. At any time, about 250-300 files are open waiting for resolution. During a normal day, about 35 open files are resolved and about the same number of new files are created. There are about 25 people from clerks to managers who are involved with the paperwork.

This case shows a typical situation in business today in terms of their relationship with computers and computer systems. The business has made a reasonable effort to stay current with the technology, but they have reached a critical juncture. The business now needs to incorporate a formal department or division of information systems if they are going to take advantage of the technology.

1. What exactly is the problem at Acme Pipe and Cable?

   The obvious answer is that they have a paperwork problem. One aspect is that they are not efficiently handling their paperwork, that is, their workflow processes need to be improved. An associated problem is the information management or document management problem of efficiently finding files and managing them so that their contents are accurate and complete.

   The larger problem is that this company has grown out of their computing resources and management. It is likely that the Support Specialist and two Business Analysts at the company do not have much formal training, educational background, or business experience in large scale Information Systems. This is all too common in many organizations and businesses today because they do not understand the requirements for large scale Information Systems.

2. Which alternative seems to be the best answer to their problem? What data would you want to be able to answer this question more accurately?

   The solution in the case study to get an IS consulting firm for the preliminary analysis is a good alternative since, as noted by Geri, they can also observe how the process is carried out. If they continue this strategy for other projects, it is certain that they will end up with an IS department.

   I would want to do a workflow analysis to help determine the actual volume and flow of paperwork. For the e-mail system, it would be useful to survey the staff to see if there is a real need for regular intercommunications.

3. Is it time for ACME to change their organization and start an Information Systems department?

   This would be a good time. It is not likely that Fred Gramble, an Associate Vice-President, will be able to devote sufficient time to this project. The project should be headed by an Information Systems officer. This might turn out to be Fred.

   It should be understood here that there are no huge or immediate costs associated with a change in the business structure to include an Information Systems department. This type of change is much more a matter of perspective and values tied to the chief operating officers of the business.

4. To what extent should possible solutions be investigated in a preliminary investigation? (The answer to this question has not been resolved by experts in the field!)

   The general consensus is that the current system should be investigated thoroughly to determine its shortcomings. Out of this investigation should flow the solution as the way to deal with the current system's shortcomings. However, this view does require a reasonably operating current system, which may not be the case. Further, the methods in the current system

may be so flawed that they cannot serve as a model for the new system. Finally, the current system may be so far removed from what is desired that it may be best to not even bother investigating it.

Some formal methodologies suggest that at least three solutions should be investigated: A minimal system, an average complete system, and a gold-plated system with all of the possible enhancements that can be envisioned. The point is to give a better cost and resource perspective to those charged with deciding on the solution.

Case 68

Into the Information Age—Discussion Ideas

By T. Lundgren

Bill Johnson and Marc Rolle of J & R Manufacturing thought that it was time to really enter the computer age. J & R produced rebuilt automobile parts in a market with a steady demand. Over the past twenty years, the business has continued its slow but steady growth. They obtain used automobile parts from salvagers, rebuild those that are consistent with automotive standards, and then market the parts through distributors. Rebuilt automotive components can provide a significant savings with quality equivalent to new parts. In addition, replacement parts for older vehicles may only be available through the rebuilt market.

This case demonstrates some of the typical difficulties faced by a small office trying to move into the information age. The general problem is the lack of computer literacy in the sense of a realistic conception of what is necessary for a successful computer application. This same problem is faced in large corporations by the Information Systems staff attempting to work with users to produce business applications. Unfortunately, the difficulties in this type of situation are compounded because there is no readily available source of computer literacy in the small office, so they stumble along, moving by fits and starts into the information age.

1. What do you think is going to happen next to J & R Manufacturing? What are the chances that their plans will be realized? What will be the agenda of the next meeting of Marc, Bill, and Chris?

   Without some prodding, probably from the owners Marc and Bill, little is going to happen. Though Chris is reasonably enthusiastic and interested, there really is not sufficient time for Chris to develop, test, and install a new application on the new hardware. Under the present circumstances, there is virtually no chance that their plans will be realized without additional resources such as a consultant. The agenda for the next meeting will likely be the same as the last meeting: What should be done about the new system that is not being utilized?

2. Are the expectations for the proposed computer system unreasonable? Can microcomputers perform the tasks suggested by Marc, Bill, and Chris?

   While microcomputers can perform the tasks suggested, nonetheless, the expectations for the proposed computer system are unreasonable because the people involved do not have sufficient knowledge to develop, test, and install an application successfully. One point that can be made here is that if a small office with minimal computer literacy is planning to buy an application "off the shelf," then they should buy a complete hardware and software solution ready to go - a turn-key application. Alternately, they should allow considerable resources to pursue the learning curve necessary to put together a hardware and software system application.

3. Should Marc have purchased the microcomputer system at the discount electronic store? Did he get a bad deal? Did the system perform unsatisfactorily?

   While it is generally true that purchasing a microcomputer system from a discount electronic store, by mail order, or from a computer superstore is unlikely to be a bad deal, this is only in terms of the price per components. Marc got a good deal for the hardware, but he got a bad deal for a business system. The system performed satisfactorily with respect to hardware operations, i.e., the keyboard worked, the display showed appropriately, etc. However, the system was unsatisfactory for the proposed use. Altogether then, Marc should not have purchased that system in those circumstances.

4. What should J & R do now? If you were called to give them advice, what would you tell them?

   First, they should plan to spend some money. One alternative is to contract with a consultant on a relatively permanent basis to set up and maintain their system. If they plan to continue moving into the information age, it might be advantageous to hire a permanent staff person to develop, test, and maintain their applications. A lesson here is that moving into the information age will require a permanent commitment of resources. An interesting alternative here would be to arrange for Chris to get the training and education needed to develop, test, and maintain applications.

The worst possible advice would be to give them some band-aid help that would allow them to get the new system up and running doing, for example, the billing. Not only would the billing application be suspect, it only puts off the day of reckoning when some real money will need to be spent.

5. If you could intervene at the beginning of this case, what would you tell J & R to do?

I would advise them to do a cost analysis, a return on investment (ROI), or similar analysis to see how financially reasonable their proposed applications would be. Basically, they should be able to show that an additional microcomputer networked to their existing system with the proposed applications should save them sufficient resources and enhance their business capabilities sufficiently so that they could afford to spend the money to hire a consultant, new staff, or train their internal staff (Chris) to do the job right. The lesson here is not to jump in and buy a computer without having a good idea of what is to be accomplished.

Case 69

Lakes Start—Project Management—Discussion Ideas

By B. N. O'Connor

This case explores those issues related to problem solving rather than actually designing a new system. The overall issue is that each of the stakeholders (those who have the most to win or lose by a new system) expect something different from the Strategic Marketing System. Because "you" are coming in mid-stream, so to speak, you must backtrack and somehow get the group to come to consensus. It will not be possible for you to design a single system to address all their needs and wants!

1. Enumerate and list the issues, concerns, or tasks to be addressed in the coming weeks:

   a. establish clear understanding of the problems to be addressed
   b. establish the boundaries (scope) of the project
   c. establish expected benefits
   d. obtain project sponsorship

2. Identify who should be involved in the resolution of these issues, concerns, or tasks:

   The answer here is everyone! But a recommendation is to begin with President Stephanie Reese, to get her views on what's important as well as obtain project sponsorship. A key discussion point would be to carefully review the mission statement with the President and link further planning to how the project supports that mission.

3. Develop strategies for involving others in this resolution (e.g., focus groups, task forces), and their responsibilities toward the project—will they simply be informed, have the right to approve the resolution, be part of a task team, coordinate activities, and the like.

   I'd talk to my immediate boss, Helen Johnson, for advice on how to approach President Reese, as well as Renee Stanford and Vivian Marshall. I'm new to this company, and before I set up any interviews or focus groups, it's best I know a little more about how these people prefer to work. Johnson might recommend that I either:
   Set up a task farce consisting of second-level managers (Tanaka, Jenkins, Marshall, Smith, and herself)
   Invite this same group to a focus group, led by a trained facilitator to help the group (not the I/S Department) agree on the scope of the project and set priorities.
   Talk individually to these managers; however, I know one-on-one discussions will not help a group come to consensus!

   I'd talk to my counterpart in the department, Claude Greengard (Telecommunications) to get his views on not only the scope of the project, but advice on how to bring key players together.

   As soon as I have worked with the management group (Johnson's level managers) and agreement exists as to the scope of the project, I'd get a sign off from them on the following, all linked to the company's mission statement:

   Business objectives
   Expected benefits
   Success factors
   Project priority
   Target schedule and completion dates

Case 70

Sampling Required—Discussion Ideas

By T. Lundgren

The National AutoService Company has been in business over 50 years with modest, though steady growth. They pride themselves on being state-of-the-art and have had an information systems (IS) department at the corporate headquarters in Dallas, Texas for a number of years. All of the major components of the corporate headquarters have a computer information system and most of them are fully integrated with each other. IS is concerned with maintenance and fine-tuning of existing systems, fully integrating all systems, and the development of new systems. They have just started to put a systems plan into effect with a Systems Planning Group, which incorporates the previous Systems Review Committee.

This case study is intended to illustrate the value of sampling. The statistical knowledge of sampling is not common knowledge in many businesses today. The concept of sampling is that it is possible to obtain representative results with acceptable error from a sample of a much larger population. The concepts and mechanics of sampling can be found in almost any text covering research or statistical methods, e.g., Duane Davis, Business Research for Decision Making, 4th Edition, Duxbury Press, 1996.

1. Is the sampling issue likely to arise again for the National AutoService Company?

   Since they are now becoming more permanently linked to the nearly 2500 regional offices, it is very likely. For example, they may want to determine if the regional offices are interested in a new module for their local administration. They may also consider sampling how the regional offices are using different modules in the system as compared to attempting an analysis of all of the offices. The point is that even if you have or can easily get the data for everyone, it isn't necessary and it will make analysis and associated efforts much easier.

2. When a company is permanently linked with a computer information system that allows for the two-way exchange of data, what kinds of information will the home office find useful? What kinds of information will the regional offices find useful?

   The home office can do profiling to determine what modules the regional offices are using and how they are using them, what reports are they generating, what error messages they are getting, when they are using the system, how long they are using it, and similar information. All of this information can be very useful for the home office to tailor the information system more closely to the regional offices needs. Some information systems of this type are being built with such profiling included as an integral part on the assumption that the system will continue to be modified and enhanced according to the way it is used. On the other hand, the regional offices could use summary data like average sales of products to compare their performance, and availability of products and services at other regional offices.

3. What do you think will be the amount budgeted for the data collection step of the LINKEM project at the National AutoService Company?

   Using the figures from the case study to get the data from the 2513 regional offices, a single-shot questionnaire would cost $1200 and using trainees for telephone interviews would cost $37,500 in labor alone. But a sample of about 361 should yield acceptable results within an acceptable margin of error. The sample is about 14 percent of the total population, so we could roughly estimate the telephone interviews at about $5400 and a single-shot questionnaire at about $175. Doing some additional interviews would cost more, but the case study does not give us much data to estimate the cost. The idea here is to show that our sampling can cut data gathering costs here by about 85 percent.

4. Did you find it a bit strange that the systems analyst and New Projects Manager knew almost nothing about statistical sampling?

   Not really. Sampling is not a major topic even in a research methodology course and the typical Information System worker would normally not encounter the topic or encounter it only briefly in an academic setting. This case study shows a typical computer information system setting where sampling can be useful. While an Information System worker does not need to know all of the technical aspects of sampling, they should certainly be aware of the benefits and how to obtain information on sampling methods.

Case 71

The Hiring Dilemma——Discussion Ideas

By K. C. Kaser

1. Who are the key actors in this case?

   The actors in this case are: John (curriculum consultant); Robert (superintendent; Richard (business education consultant); Roger (20-year high school business teacher)

2. What kind of leadership style does John use? Is it effective in this given case?

   John's leadership style is open (laissez faire); this style of leadership is not effective for this case.

3. How was John promoted? Could this affect his hiring decisions?

   John was promoted by the superintendent. This promotion will definitely influence his future personnel decisions.

4. Is this case an example of effective or ineffective networking?

   This case is an example of ineffective networking because friendships and biases can get in the way of making the best decision.

5. What decision must John make? What are the advantages/disadvantages of each decision?

   In this case, the decision John must make and the advantages/disadvantages of each decision are:
   a. business education remains strong, but no budget cuts
   b. keeping business education, cutting the budget, but weakening the business education curriculum
   c. cutting the budget, but definitely weakening business education

6. Why would John be tempted to eliminate the business education consultant position?

   John would be tempted to eliminate the business consultant position for the following reasons:
   a. to meet budget constraints
   b. to eliminate curriculum that competes with social studies
   c. to not make a decision regarding who to hire

7. If both candidates for the business education consultant position are good, who do you think John should select for the position? Why?

   Answers may vary; students should justify their recommendation through sound rationale.
   Reasons for the recommendations should be sound, i.e., professional experience, etc.

Case 72

Don't Try to Change Me—Work on Yourself—Discussion Ideas

By S. Lund-O'Neill

1. What makes Tamera believe it is Melinda's self-esteem that needs work? What do you think? On what are Tamera's and/or your conclusions based?

   Tamera believes it is Melinda's self-esteem that needs work because of the statement "She is always putting people down, especially herself." It could very well be a lack of self-esteem, based on the whole statement as well as the one just restated.

2. Make a list of elements that may be contributing to Melinda's problem. Provide one or two suggestions for each of the elements that could be helpful for Melinda and her co-workers in addressing Melinda's problem.

Contributing Elements	Suggestions
compliments	Give positive feedback. Many people have not learned how to accept compliments and are very uncomfortable in receiving them, yet they want and need positive feedback.
neat/sloppy/messy	Define to her the preferred norm. What is messy and what is neat? Demonstrate and explain to her the "neat" way and how it can be changed. This is a habit that changes with environmental awareness. If she is told she is doing it "right," it reinforces the action is correct.

3. Discuss how contemporary models of motivation can be applied to Melinda's situation.

   Capitalize on positive reinforcement and finding ways to reinforce positive actions that will turn Melinda's attitude in positive direction.

4. Why is it important to have a good balance in one's life? What are the elements that need more balance in Melinda's life and how can she see that such a balance is important?

   Balance is always important to keep one's goals and objectives in perspective. Elements that need balancing is in Melinda's developing awareness of her physical surroundings and the image she is conveying. In this society, particularly, image in more important than action.

   Habits are learned ways of behavior based on values and awareness. Before working on changing a habit such as "sloppiness" to "neatness," one must be aware what is "sloppy" and what is "neat." Then one must see the need for change and the value they get from making change.

5. Why do people like to be around positive vs. negative people? How can you become more positive? How can you help others to be more positive?

   People generally prefer to be around positive people than around negative people because even though we may be aware of and able to filter out negatively, we are also like sponges that absorb the negative and positive energies of others. We like to feel good, but realize that some people feel good only through being negative. When we feel good endorphins are released which not only make us feel good, but helps us stay healthy. Negativity can be toxic to our system. A person can become more positive through thinking before speaking. We don't have to become a Pollyanna, but the old adage, "If you cannot say anything good, don't say anything at all" has some validity. Before speaking see if the following question can be answered affirmatively. Will what I say make a person feel valued or devalued? The best way to help someone become more positive is to be a role model. Realize that the nature vs. nurture in people's lives reinforces positivism as well as negativism. A motto might be "I'm in the value business.

Case 73

To Manage or be Managed—Discussion Ideas

By S. Lund-O'Neill

1. When Mr. Rothman and Jason meet to discuss the business, what do you think should be the main topics of discussion?

   Compliment Jason's abilities. Possibly get him to talk about what is going well and what needs improvement in daily operations. Get Jason to see that quality control training and general training are important management skills that he is able to develop further, so that he can rely on others. The profits may be up, but he negative word on the street about employee turnover will hurt him and the business.

2. Assume Mr. Rothman suggests to Jason that Jason needs to manage his own time better, needs to set priorities, needs to identify what is important vs. what is urgent, needs to schedule activities for himself and others, etc. Identify other areas Mr. Rothman may suggest to Jason. Explain some ways Jason could implement these suggestions in improving the operations of the creamery while helping Jason with his own self management.

   Ask Jason what he would like his employees to do that they aren't doing. Assuming that he wants to trust them, he must begin by trusting them first and demonstrating his trust. Show him how he can train them and encourage him to do so. Although he may feel he can do it better and faster than if he is constantly training some one, he needs to see that his leadership skills will become more fine tuned. First Jason should write down everything he wants done, when he wants it done, and any specifics that he feels are important. Suggest that there is the possibility of more than one way of doing something and still meeting the goals. Suggest he hold team meetings where the team will establish (with Jason's guidance and approval) schedules of duties, rotations, quality control, etc.

3. What could Jason do to get his employees to work as a team to maximize the management of the creamery?

   Jason should take notice and acknowledge immediately to the employee when (s)he has done a task to quality performance. When something is not done correctly, quickly show how the task could/should be done to meet quality standards. In other words, acknowledge the person, correct the deed.

4. If Jason "can do everything better and faster himself", why shouldn't he continue to operate the business in the manner he knows best? What suggestions would help Jason understand he doesn't have to do everything himself?

   Jasons' strengths as a manager are that he knows what and how to carry out the tasks of the operation. As a manager he has the knowledge and responsibility to convey expectations and direct the employees to perform according to the standards he and the team have set. He will discover that the people can perform as well as he, that he is not as tired, and that he has time to think of creative ways to maintain and grow the business.

5. Identify the good and poor management principles that are present in this case. Which ones should Jason work on to improve his own self-management skills?

   The good management principles in the owner is identifying a dependable employee and recognizing, that is spite of rising sales, reputation is most important. Poor management style may have been that the owner did not convey to Jason from the beginning his expectations and discuss how those expectations could be met. It is good that Mr. Rothman decided to have a discussion, but poor in that he realizes that it "is long overdue." Jason could benefit from working on the same areas.

6. Make a chart of good management skills. Add two columns to the right of each skill and label the columns "Organization" and "Self". Then place an "x" in the appropriate column(s) if the skill is organizational and/or if it is personal. Draw some conclusions about your chart.

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Good management skills:	Organization	Self
two-way honest communication:	X	X
timeliness:	X	X
ask for and be receptive to feedback:	X	X
clearly define the job from the start:	X	X
clearly define expectations from the start and as expectations and job requirements change		
acknowledge employees concerns:	X	X
Don't diminish or admonish concerns	X	X
Dependability & accountability	X	X

It takes a lot of effort to work up to potential, improve oneself, be receptive to give-and-take, etc. The rewards, however, are very satisfying

Case 74

Where Do I Find A Telephone Card?—Discussion Ideas

By G. N. McLean, M. D. McLean, & L. D. McLean

1. What additional consumer or market research would be useful? Why?

   a. Find out what has been done in other countries where prepaid telephone cards have gained wide acceptance.
   b. Identify consumers who currently use prepaid telephone cards and those who use calling cards from specific long-distance providers and interview them.
   c. Conduct focus groups to determine reactions from consumers for suggested changes.
   d. Conduct focus groups among potential distribution outlets to determine what they need to market the cards.

2. What suggestions would you make to overcome the concerns that surfaced during the consumer interviews?

   a. Create a debit card so that funds are withdrawn from the person's bank account when the call is completed.
      Offer additional credits to compensate for the advance purchase.
   b. All of these solutions would require significant investment in technology:
      Provide digital displays on telephones to give amount of money left on the card.
      At the completion of the call, punch the card across a pre-printed scale to indicate how much money is left on the card.
      Print out on the back of the card at the completion of the call, the number called, the date, and the amount of the call.
   c. Digital display would provide ongoing feedback.
      A signal could be given every five minutes, for example.
      Provide cards in lower denominations, e.g., $1 or $5.
      Provide the option to pre-set the limit for a specific call using the telephone keypad.
   d. Provide lower denomination cards so any loss is reduced.
      Give purchasers the option of using a PIN number so that the value left on a lost card could be recovered.
      Use a rechargeable card so that the individual can select the amount of value on the card.
   e. No numbers will be required with magnetic strip cards unless purchasers desire the extra protection against loss.
      Create a cross-over card that will use the same PIN number as used by the bank and credit cards.
   f. Provide two magnetic strip slots so that both cards could be read to use up small amounts left at the end of each card.
      Provide extra units to compensate for any loss of units.

3. What would your recommendations be for developing appropriate distribution outlets?

   a. Determine what outlets have been used in countries in which the use of prepaid telephone cards has been successful.
   b. Pursue suggestions from the focus groups of potential distributors.
   c. Allow distribution outlets to put free advertising on the telephone cards sold in that establishment.
   d. Market to the end user to create market pull.
   e. Include direct mail fliers in telephone bills, with the telephone company selling cards directly to consumers.
   f. Determine why there have been difficulties to date in acquiring outlets. Sell in all locations in which telephones are sold.
   g. Consider a wider range of designs to extend appeal.
   h. Install company-owned vending machines in high traffic locations, e.g., universities, airports, entertainment centers, etc., as well as beside telephones that are compatible with the cards.

4. How would you suggest that the prepaid telephone cards be packaged?

   a. Vending machines
   b. Posters with designs displayed; cards are picked up at the cash register
   c Multi-packs, especially attractive when designs are related to one theme (e.g., souvenirs of a specific location)
   d. Package with telephones for promotional purposes
   e. Market to companies to use as advertising/promotions

5. What role would you expect the telephone company to play in marketing?

   a. Promote in advertising
   b. Provide pay telephones that are compatible with the cards
   c. Share in Research and Development to improve the technology
   d. Direct mail with bills to sell directly to consumer
   e. Point of purchase advertising and sales in telephone company retail outlets

6. What additional sources of revenue might the company explore to market the card?

   a. Sell advertising space on the card
   b. Consider development of an integrated card that could be used for many purposes in addition to a telephone card, e.g., debit card, ATM card, post office vending machines, security card, food stamps, driver's license, and several other functions that could be incorporated into a card with a micro chip.
   c. Pursue "premium" cards with designs of high interest to collectors so that the cards are saved and not even used, and that might be of interest to collectors in other countries.

Chapter 5

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